Performance Management for ePerformance Administrators

Job Aid

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Revision History

Version	Date Updated	Summary of Changes	Author
1.0	9/25/19	Updated to new HR Links Template	IBM
2.0	3/02/20	Removed Section 3 "Maintain Content Catalogue"	IBM
3.0	4/27/20	Section 3 Re-Added, "Maintain Content Catalogue". Section 3 Removed from the Support Job Aid and not the Administrator Job Aid	IBM
4.0	5/21/20	Removed Section 3 "Maintain Content Catalogue" removed.	IBM

Introduction

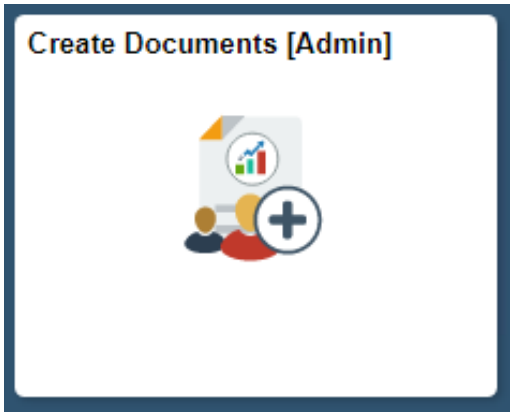
Section 1: HR Administrative Tasks

This section provides ePerformance Administrators and Support with information about completing administrative tasks in the ePerformance component of HR Links.

Topic 1.1: Create New Documents

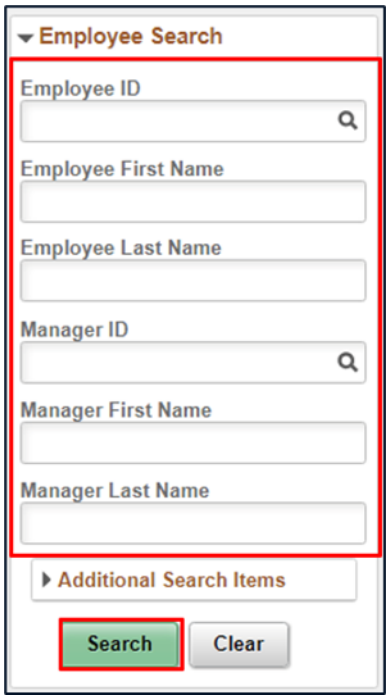
1.1.1 Create New Performance Documents

1 Select the Create Documents [Admin] tile.



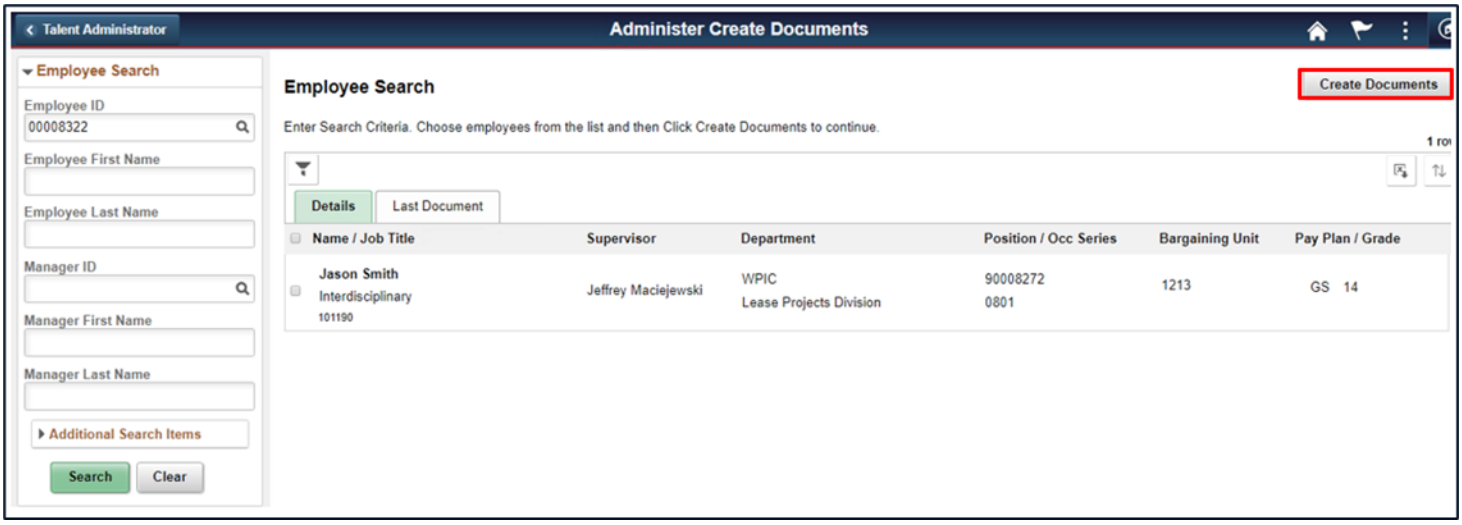
2 Enter the search criteria of the desired employee.

3 Select Search.



4 Select the employee from the search results.

5 Select Create Documents.



6 Select Period Begin Date and Period End Date.

7 Select Performance Document from the Document Type drop-down menu.

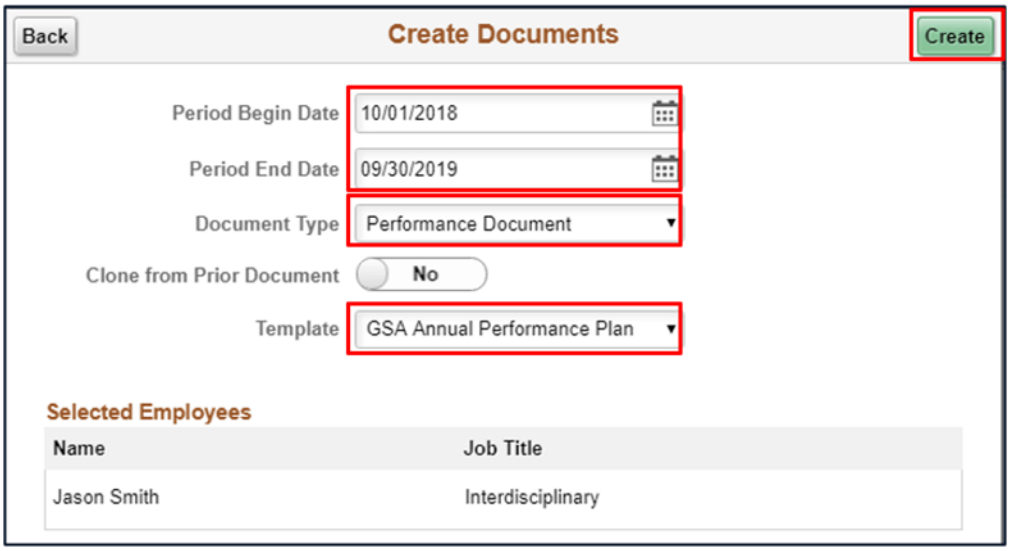
8 Be sure that the *Clone from Prior Document* switch is set to No.

Note: If you would like to clone a new performance document from an existing one, go to the *Clone a New Performance Document from Existing Performance Document* section below.

9 Use the *Template* drop-down to select GSA Annual Performance Plan.

Note: Other options include Mass Approval and OIG Template. Do not use Mass Approval. The OIG Template will be used for GSA OIG ePerformance.

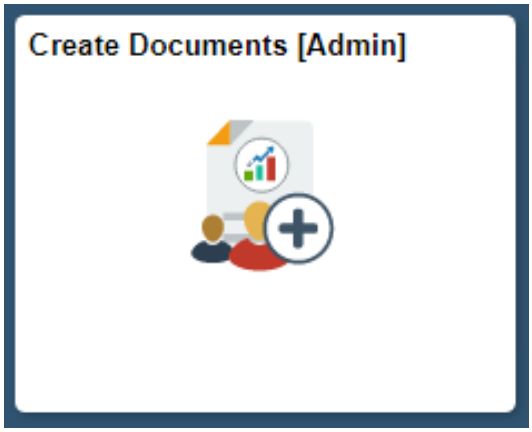
10 Select Create.



11 The document will appear in the employee's *Current Documents*.

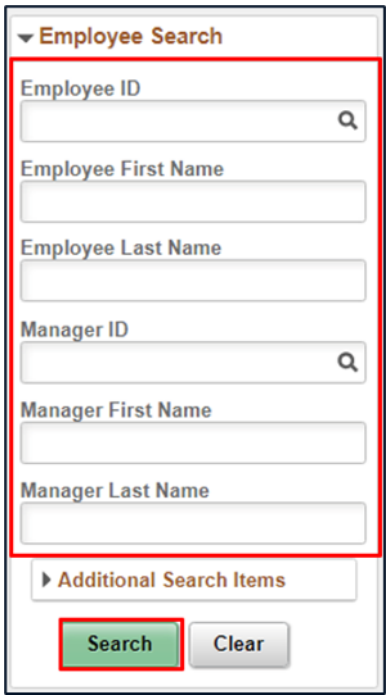
1.1.2 Clone a New Performance Document from an Existing Performance Document

1 Select the Create Documents [Admin] tile.



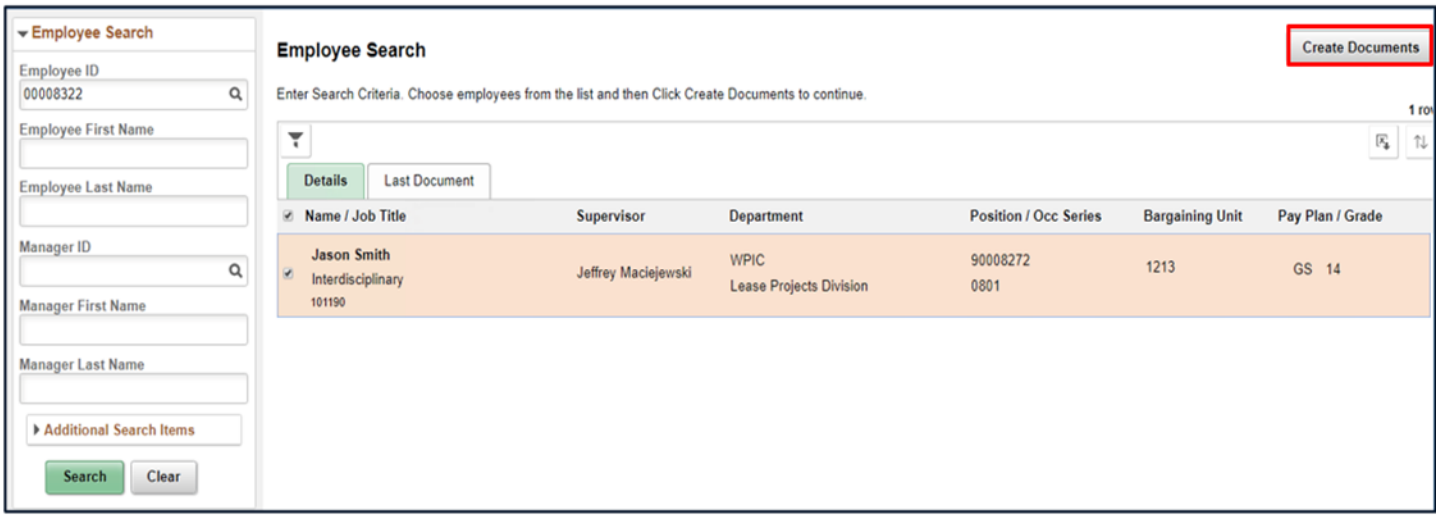
2 Enter search criteria to find the correct manager.

3 Select Search.



4 Select the employees from the list of search results.

5 Select Create Documents.



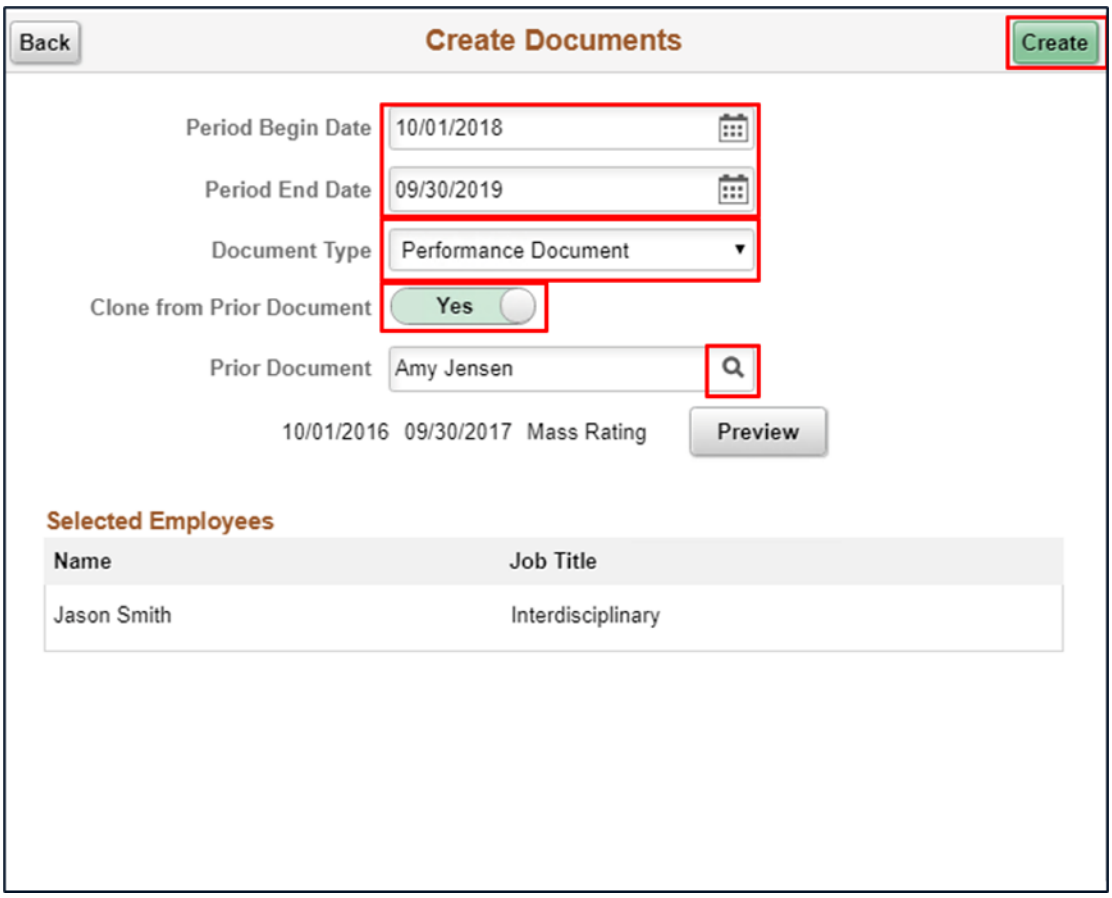
6 Select Period Begin Date and Period End Date.

7 Select Performance Document from the *Document Type* drop-down menu.

8 Toggle the *Clone from Prior Document* switch to Yes.

9 Use the lookup icon to select the associated prior document.

10 Select Create.



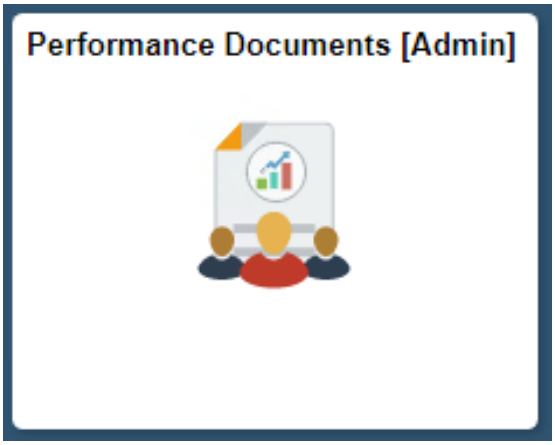
11 The new document will appear in the employee's *Current Documents*.

Topic 1.2: Modify Dates

1.2.1 Modify Issue Date of Performance Document

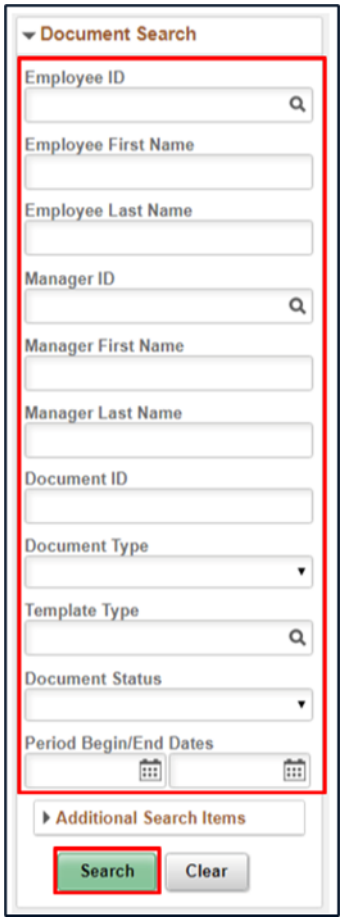
Note: Only Administrators can modify the issue date of a performance document.

1 Select the Performance Documents [Admin] tile.

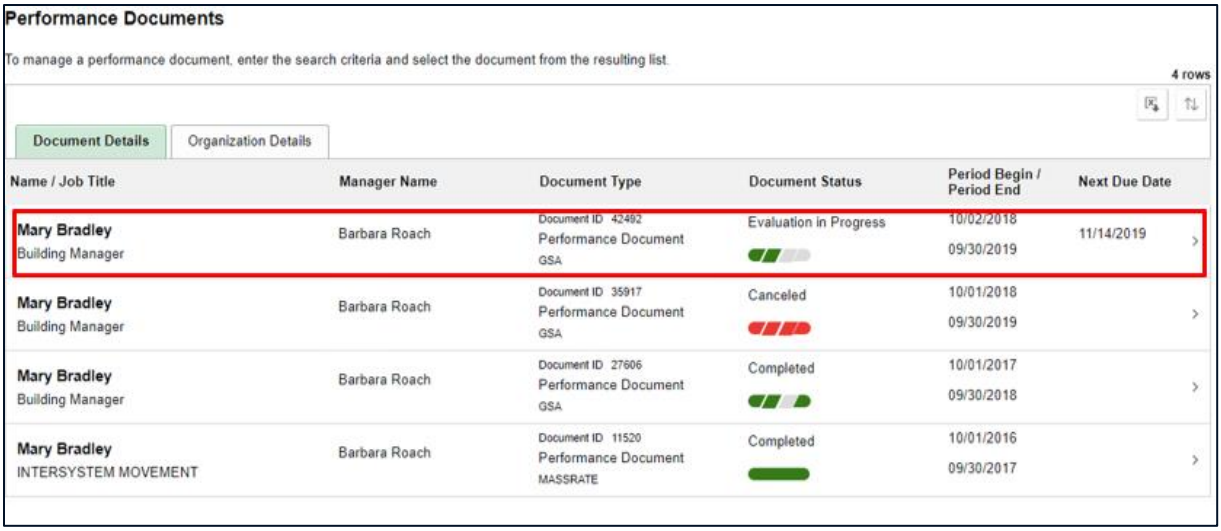


2 Enter the search criteria of the desired employee.

3 Select Search.

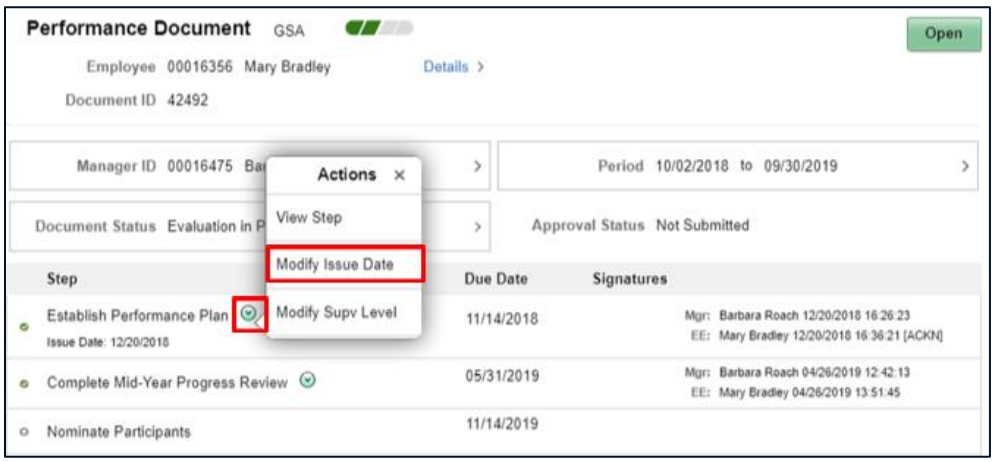


4 Select the performance document you wish to modify.



5 Select the Related Actions arrow next to *Establish Performance Plan*.

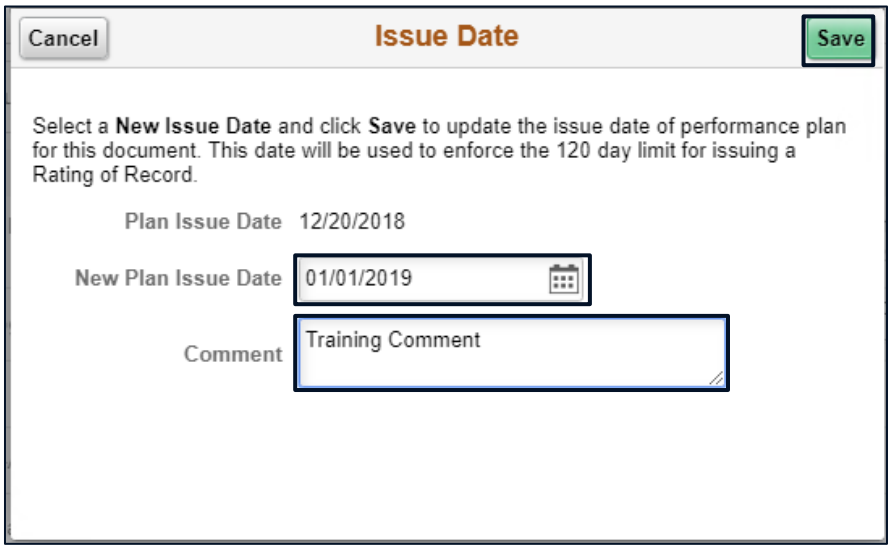
6 Select Modify Issue Date.



7 Use the drop-down to select a New Plan Issue Date.

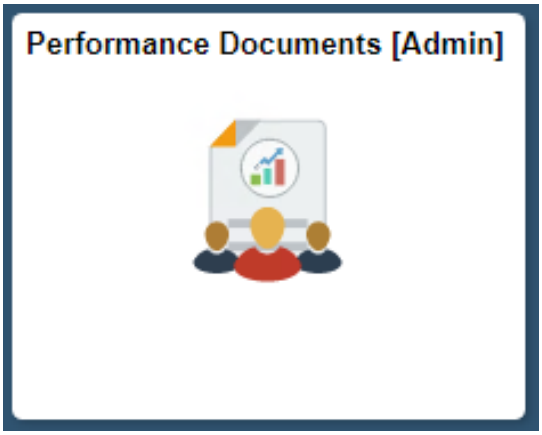
8 Enter comments in the Comment field.

9 Select Save.



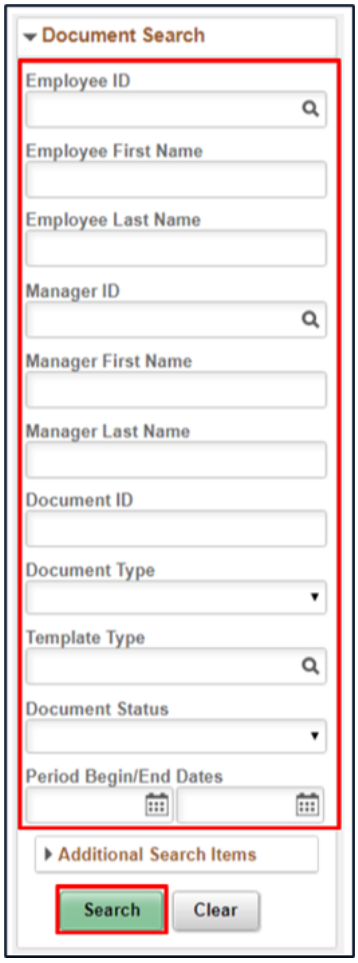
1.2.2 Change Rating Period Dates

1 Select the Performance Documents [Admin] tile.

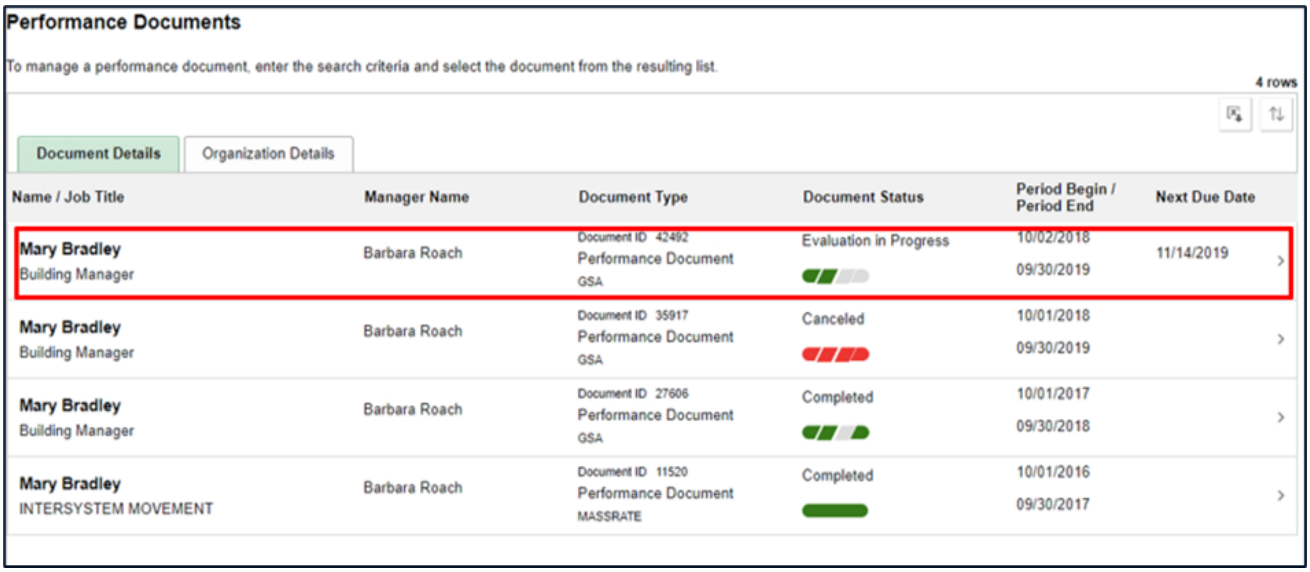


2 Enter the search criteria of the desired employee.

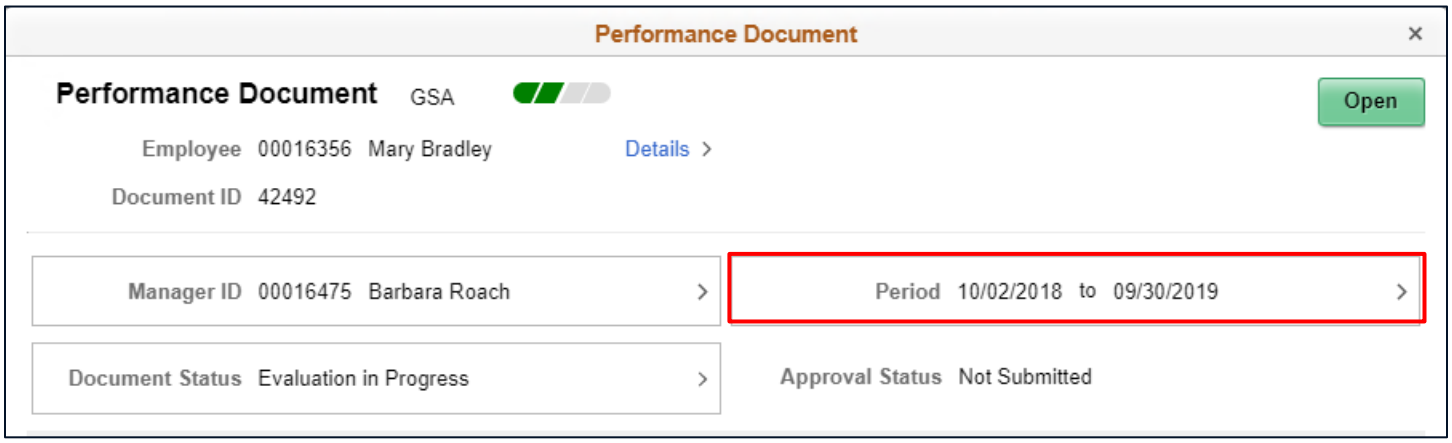
3 Select Search.



4 Select the performance document you wish to modify.



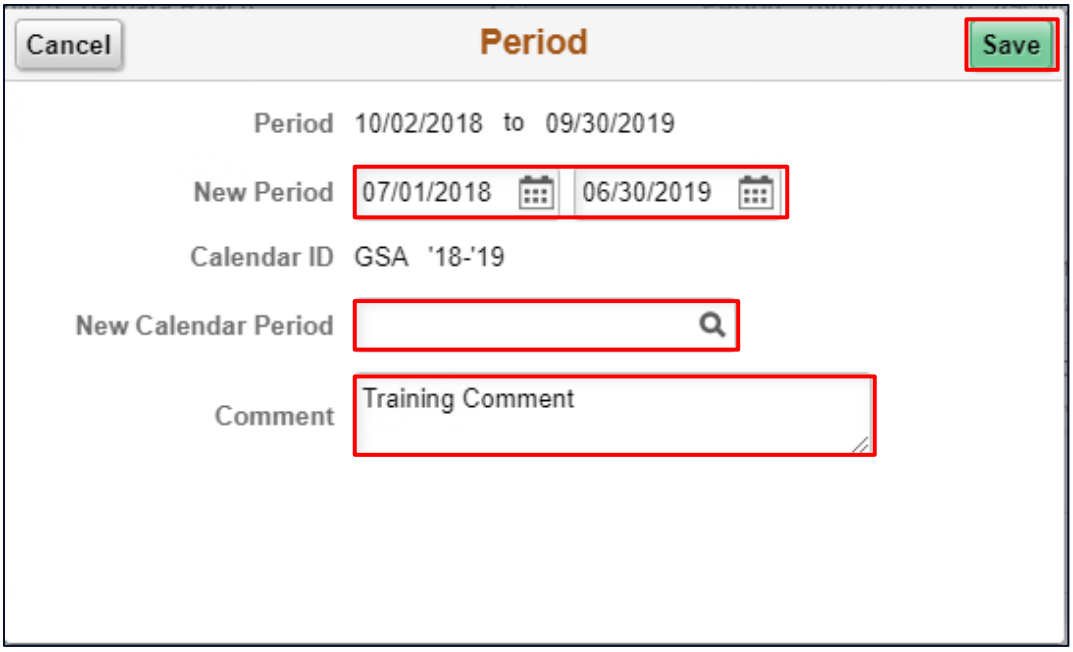
5 Select the Period tab.



6 Select the new period by entering dates in the New Period field or using the New Calendar Period lookup.

7 Enter a comment in the Comment field.

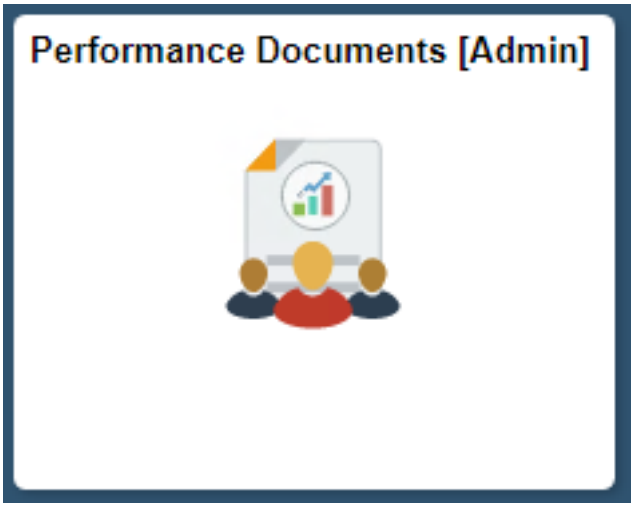
8 Select Save.


Cancel
Period
Save
Period 10/02/2018 to 09/30/2019
New Period 07/01/2018 06/30/2019
Calendar ID GSA '18-'19
New Calendar Period
Comment
Training Comment

Topic 1.3: Change Document Reviewers

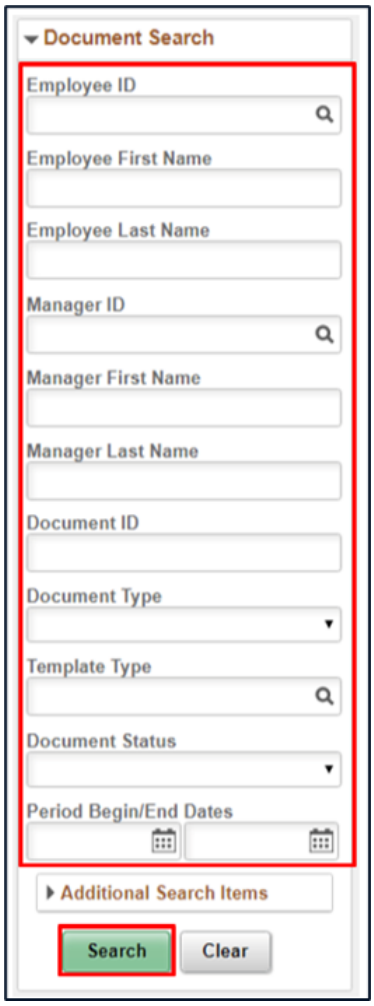
1.3.1 Transfer Document Supervisor

1 Select the Performance Documents [Admin] tile.



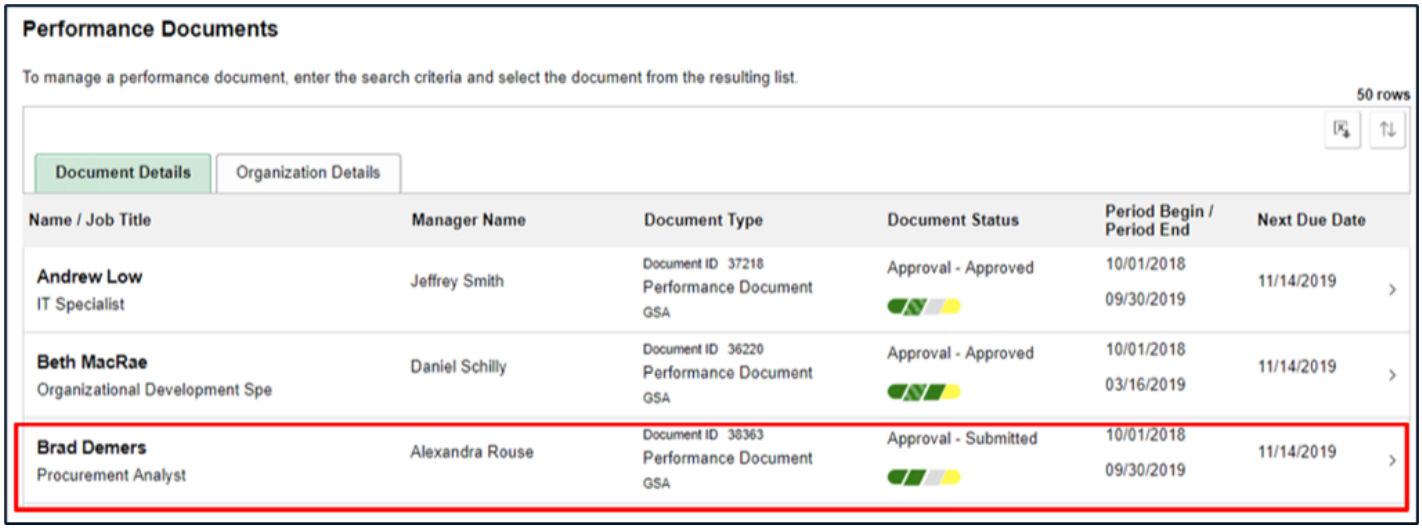
2 Enter the search criteria of the desired employee.

3 Select Search.

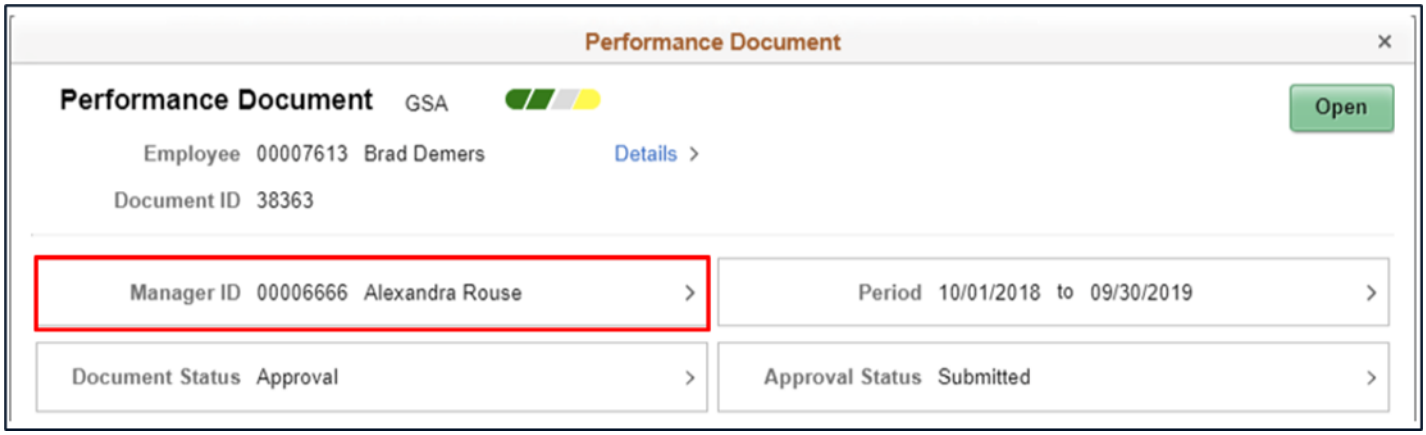


4 Select the employee's performance document.

Note: This document must be in Approval – Submitted status.



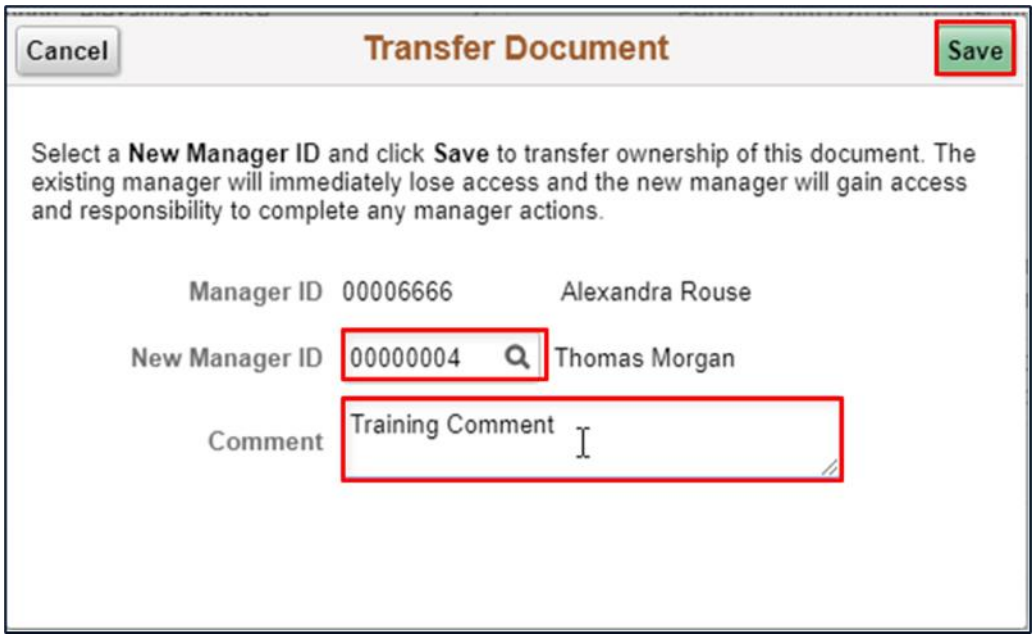
5 Select the Manager ID tab.



6 Use the lookup function in the New Manager ID field to enter a new reviewer.

7 Enter comments in the Comment field.

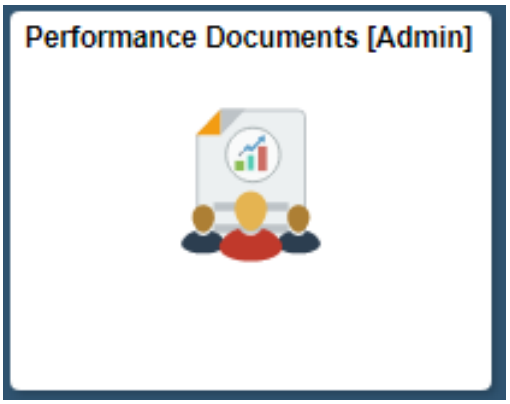
8 Select Save.


Cancel
Transfer Document
Save
Select a New Manager ID and click Save to transfer ownership of this document. The existing manager will immediately lose access and the new manager will gain access and responsibility to complete any manager actions.
Manager ID 00006666 Alexandra Rouse
New Manager ID 00000004 Thomas Morgan
Comment Training Comment

1.3.2 Change Document Approver

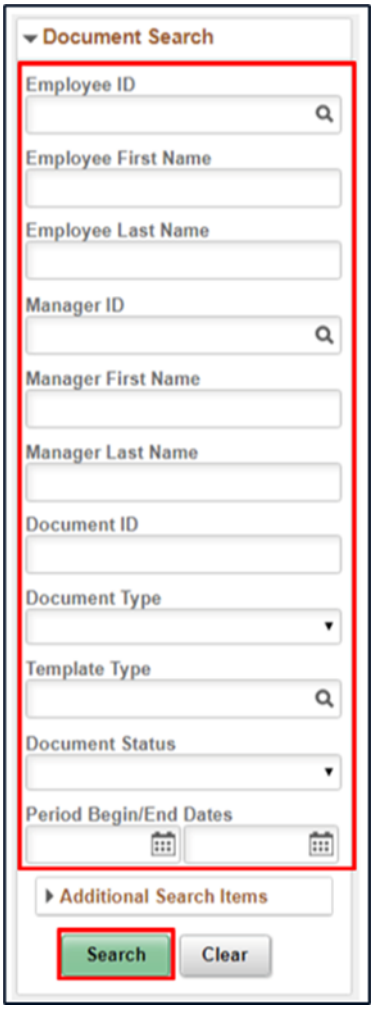
Administrators may change the designated approver of a performance document after the document has been submitted for approval. To change a document reviewer, follow these steps:

1 Select the Performance Documents [Admin] tile.



2 Enter search criteria to find the correct employee.

3 Select Search.

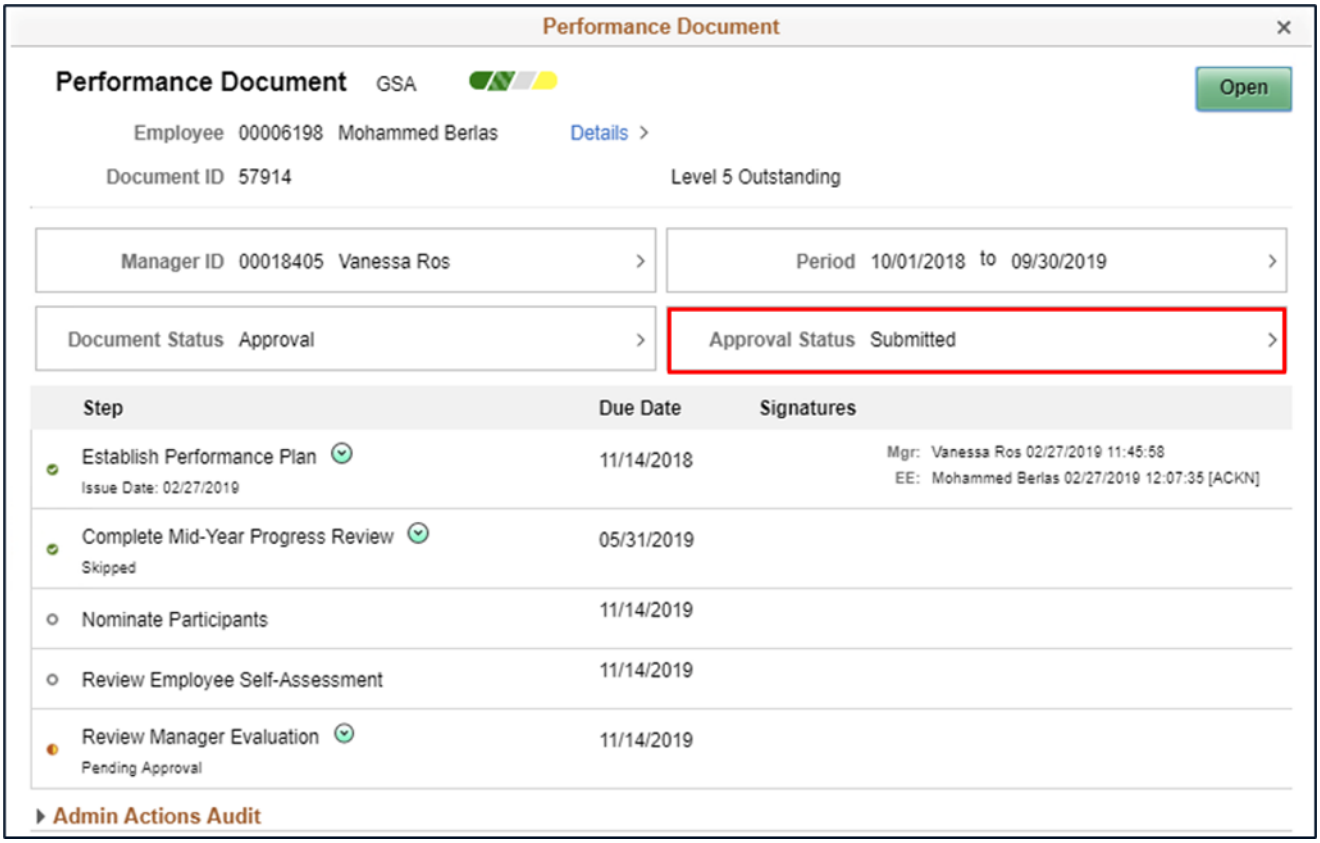


4 Select the performance document on which you want to change an approver.

Marjusz Lewandowski INTERSYSTEM MOVEMENT	Liliana Delbonifro	Document ID 23373 Performance Document GSA	Approval - Approved	10/01/2017 03/31/2018	11/14/2018
Mohammed Berlas Chief Information Security Off	Vanessa Ros	Document ID 57914 Performance Document GSA	Approval - Submitted	10/01/2018 09/30/2019	11/14/2019
Ralph Hunter Contract Specialist	Kevin Mitchell	Document ID 41895 Performance Document GSA	Approval - Submitted	10/01/2018 03/30/2019	11/14/2019
Robert Sodano Contract Specialist	Rodger Hoover	Document ID 38517 Performance Document GSA	Approval - Approved	10/01/2018 09/30/2019	11/14/2019

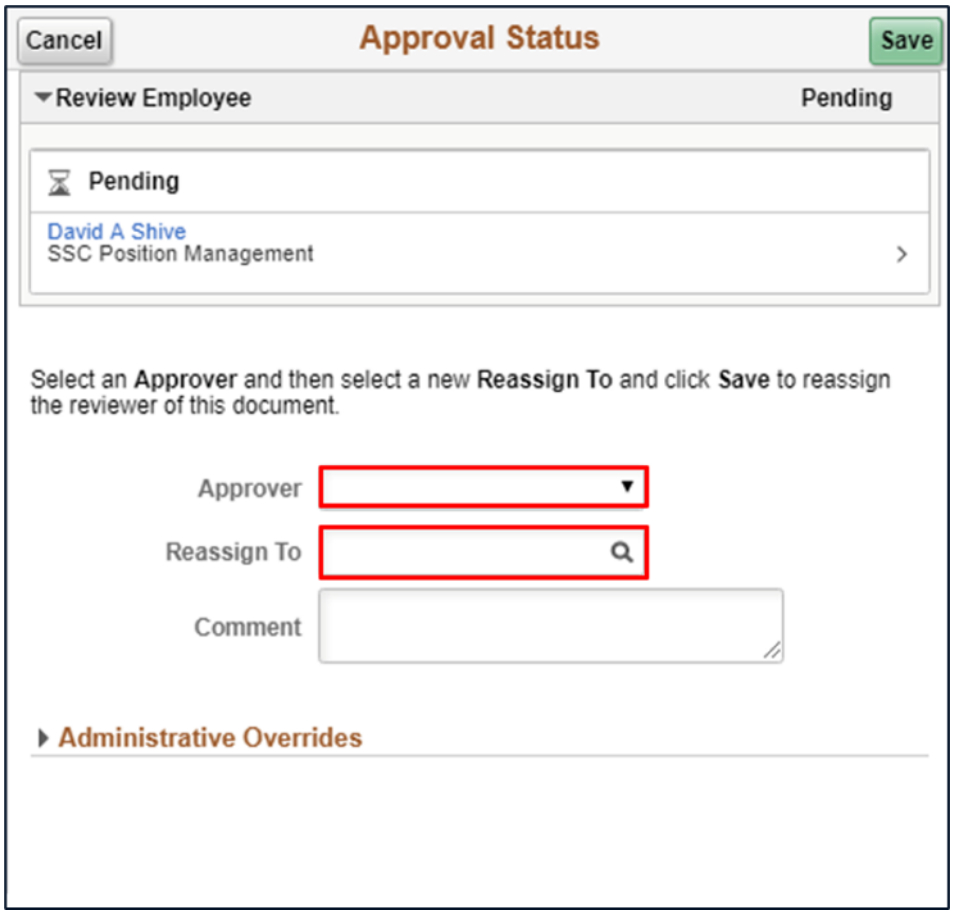
Note: The document must be in Approval – Submitted status.

5 Select the Approval Status tab.



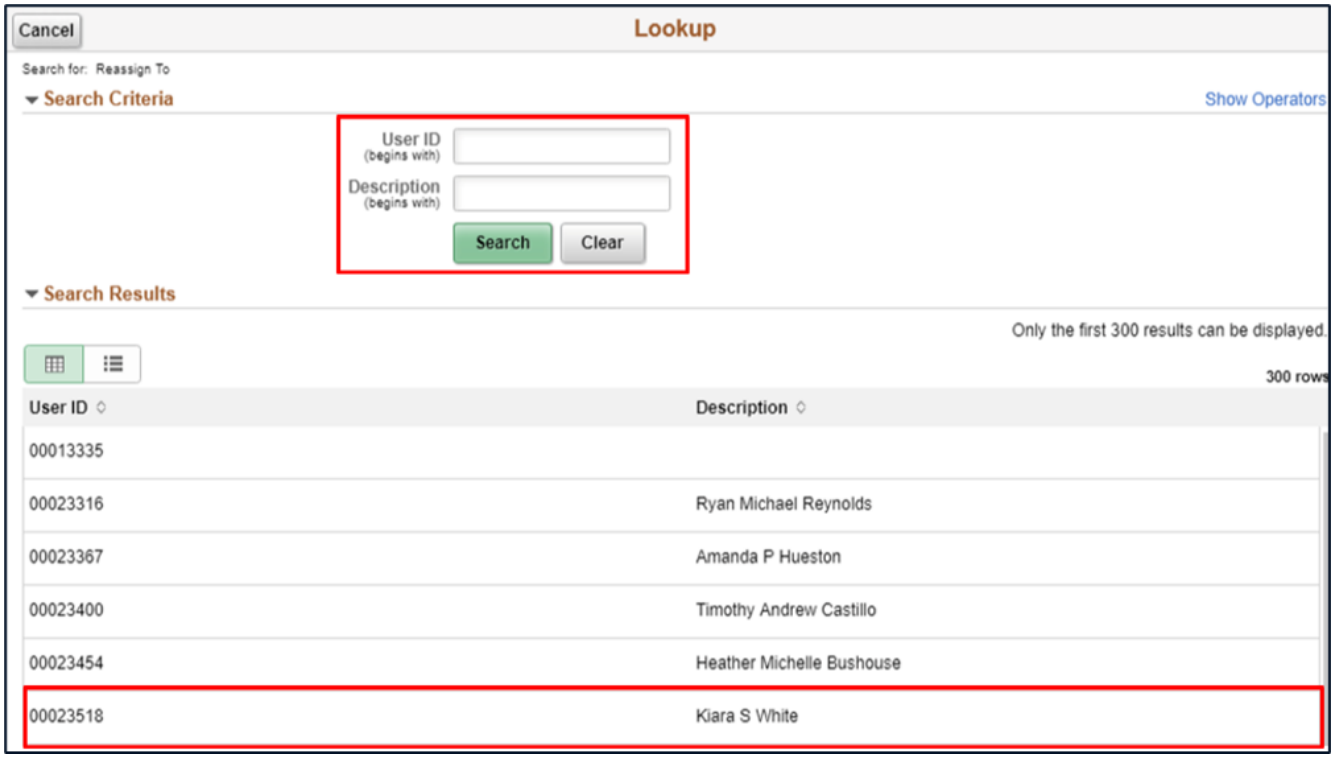
6 Select the Approver you wish to change from the drop-down menu.

7 Use the *Reassign To* lookup icon to select the document's new approver.



8 Enter search criteria to find the new approver.

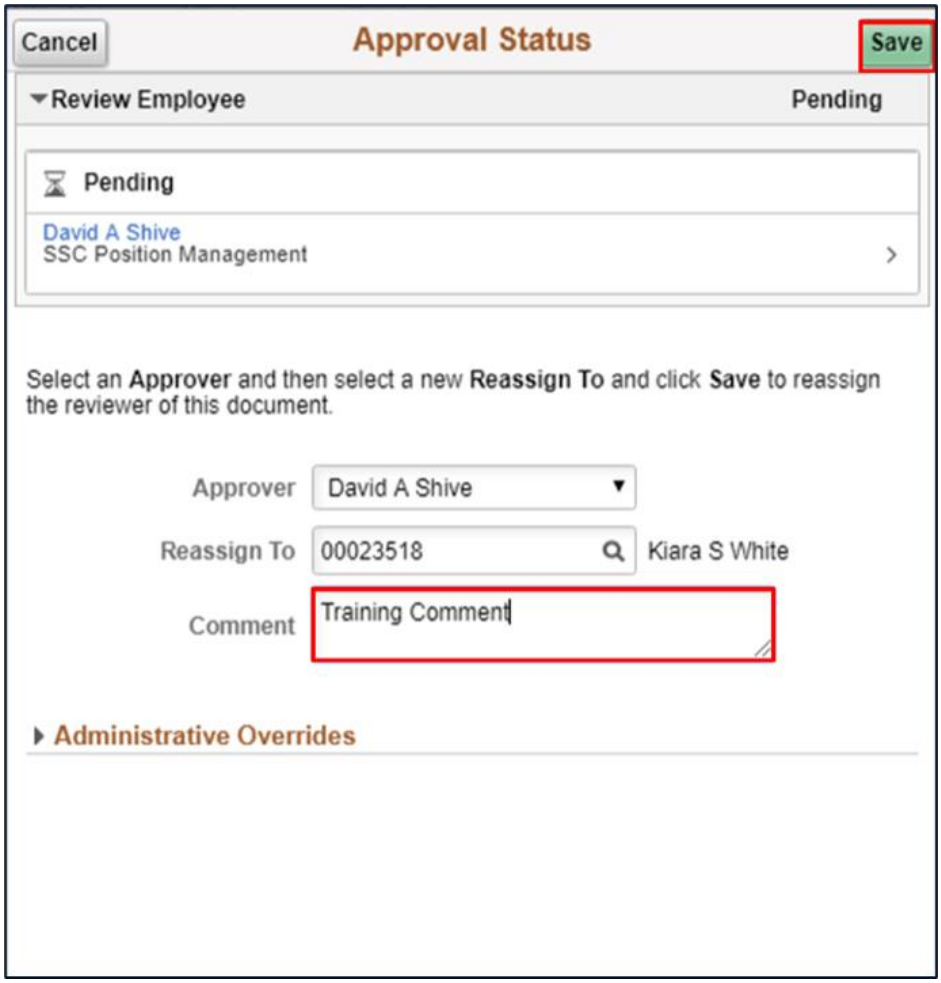
9 Select the new approver from the search results.



Note: The new Approver will be added at the same level as the previous reviewer.

10 Add a comment in the Comment section, if applicable.

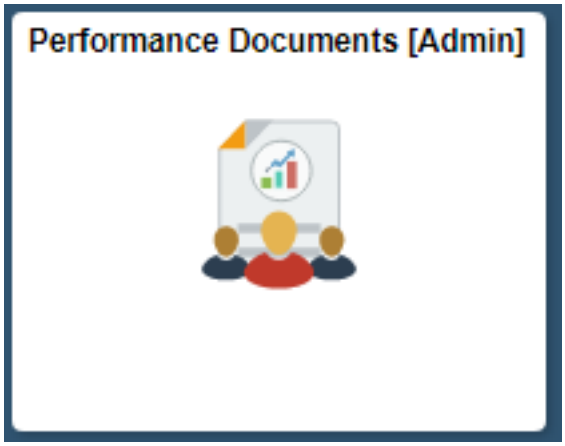
11 Select Save.



Topic 1.4: Change Document Status or Reopen a Document

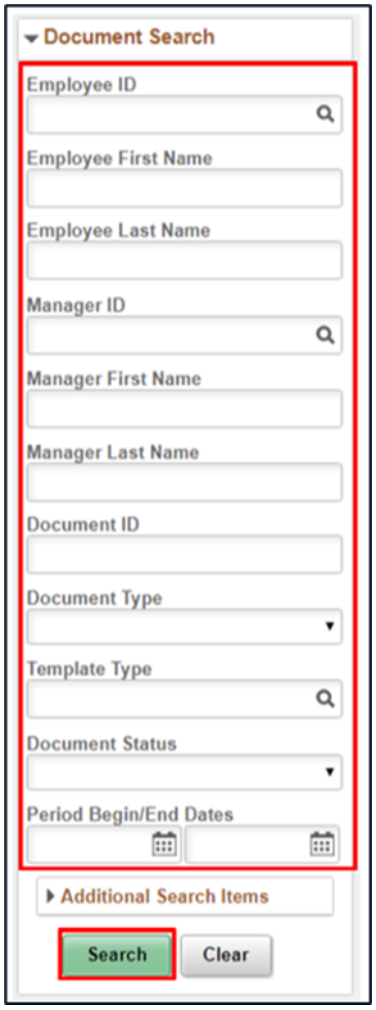
1.4.1 Reopen Establish Performance Plan Step

1 Select the Performance Documents [Admin] tile.

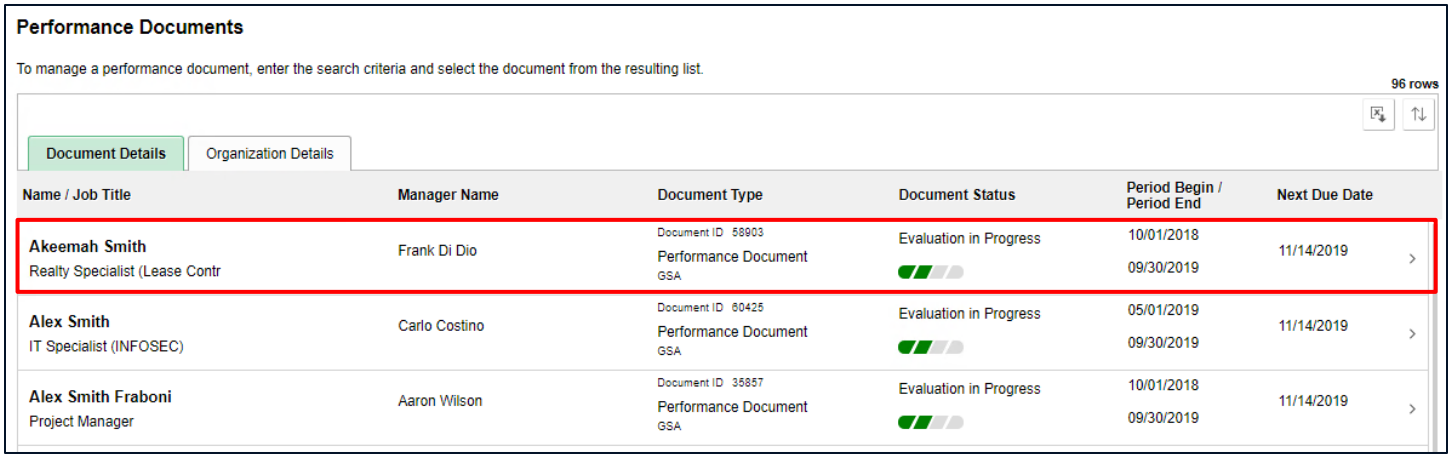


2 Enter search criteria to find the correct employee.

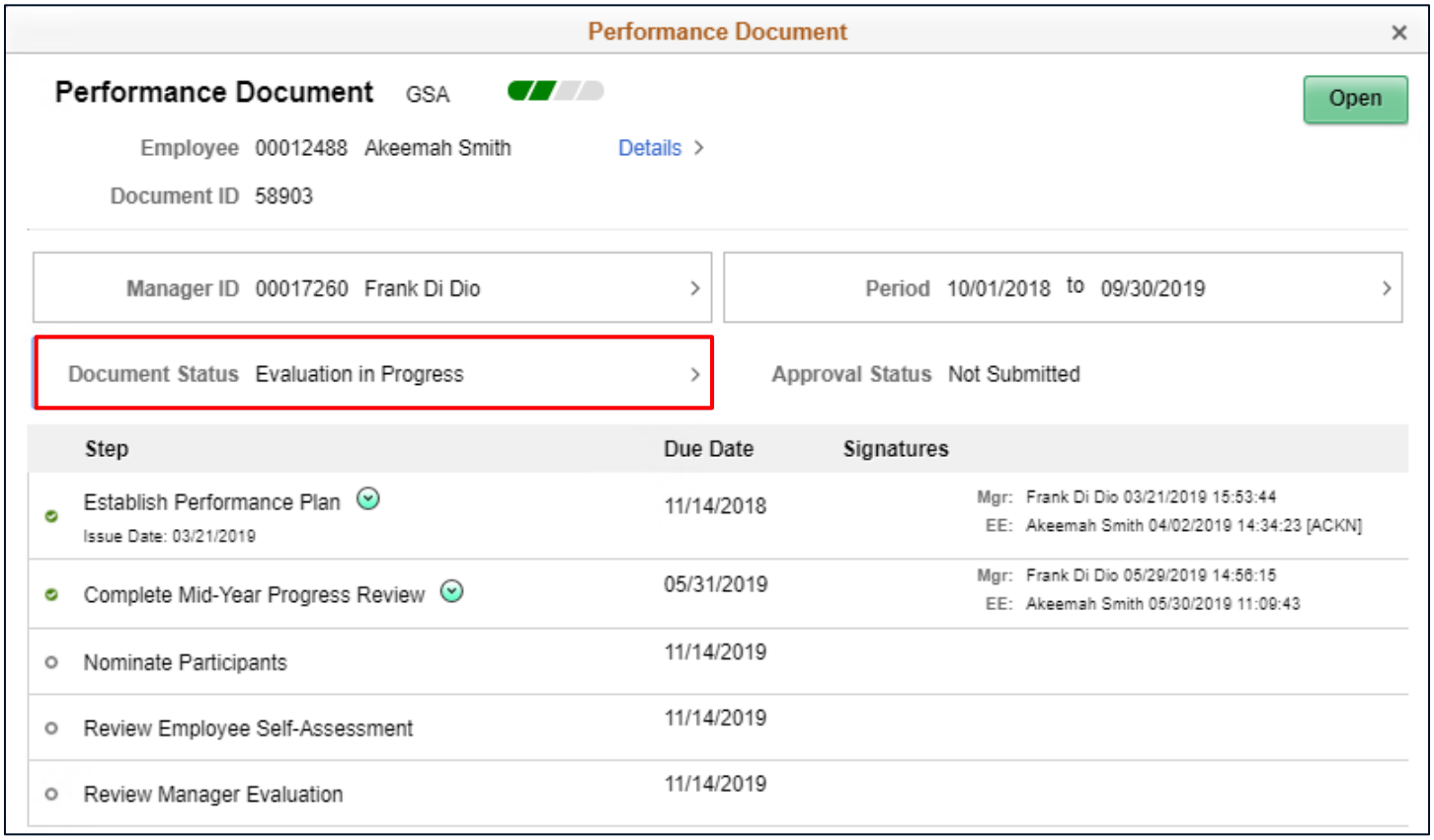
3 Select Search.



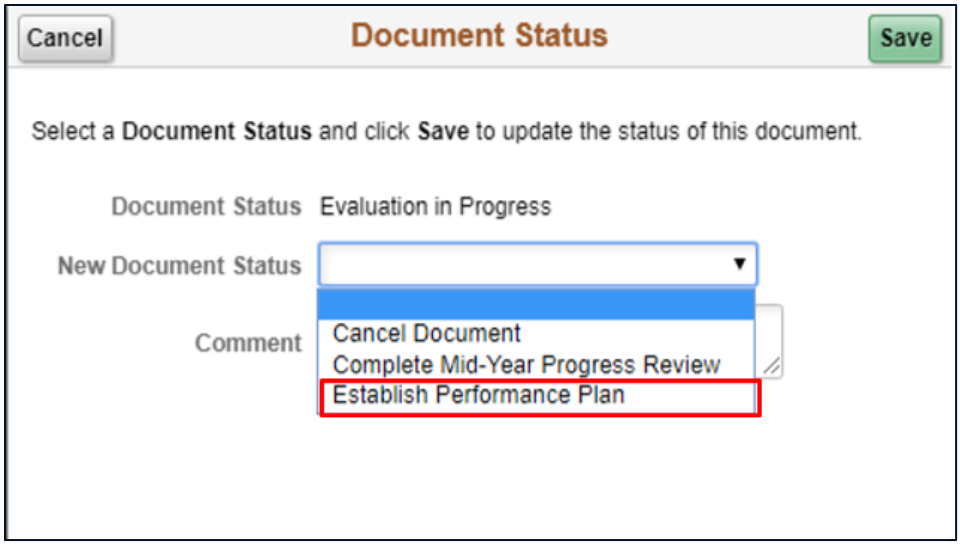
4 Select the document on which you wish to reopen the *Establish Performance Plan* step.



5 Select the Document Status tab.

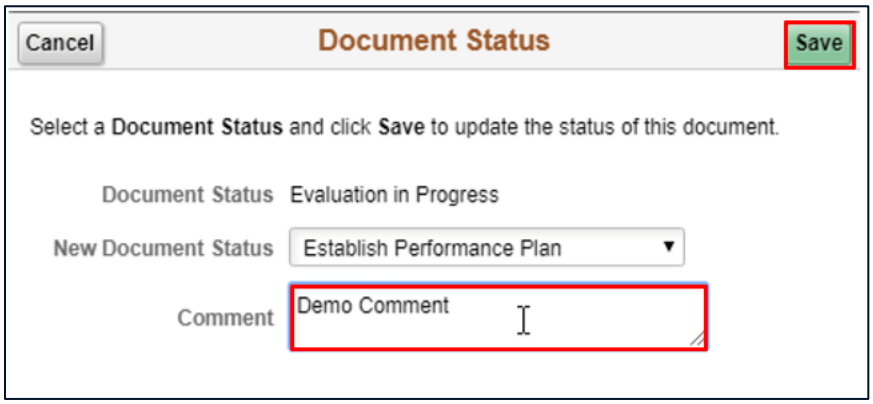


6 Select Establish Performance Plan from the *New Document Status* drop-down.



7 Enter a comment in the Comment field.

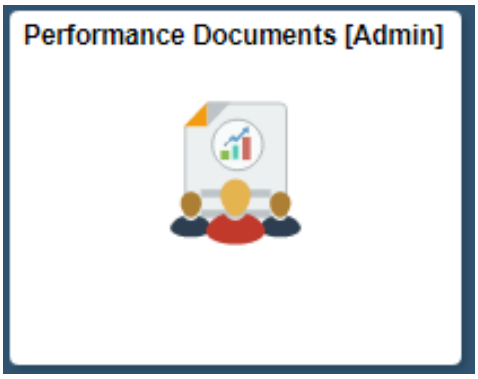
8 Select Save.



1.4.2 Reopen Employee Self-Assessment

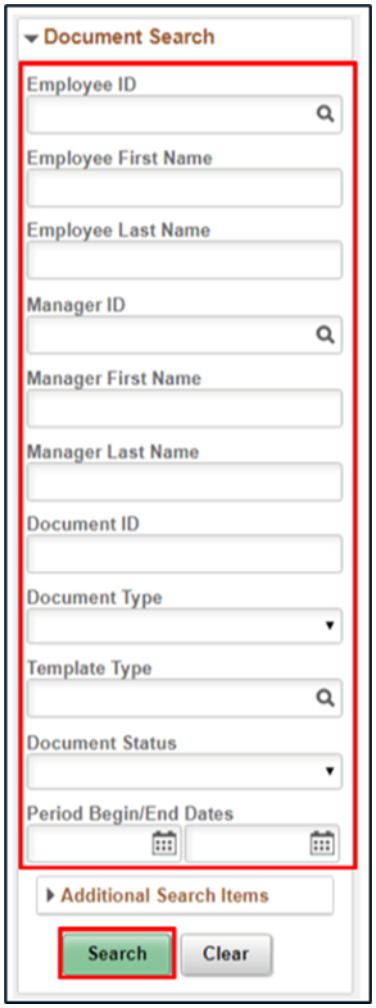
Roles: Administrator, Support

1 Select the Performance Documents [Admin] tile.

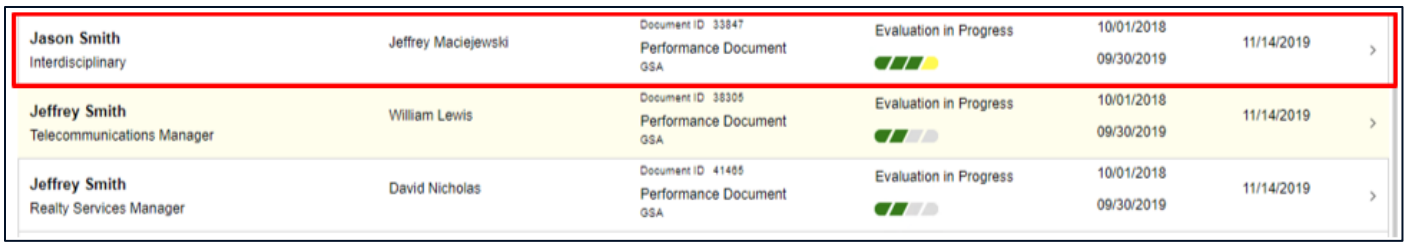


2 Enter search criteria to find the correct employee.

3 Select Search.

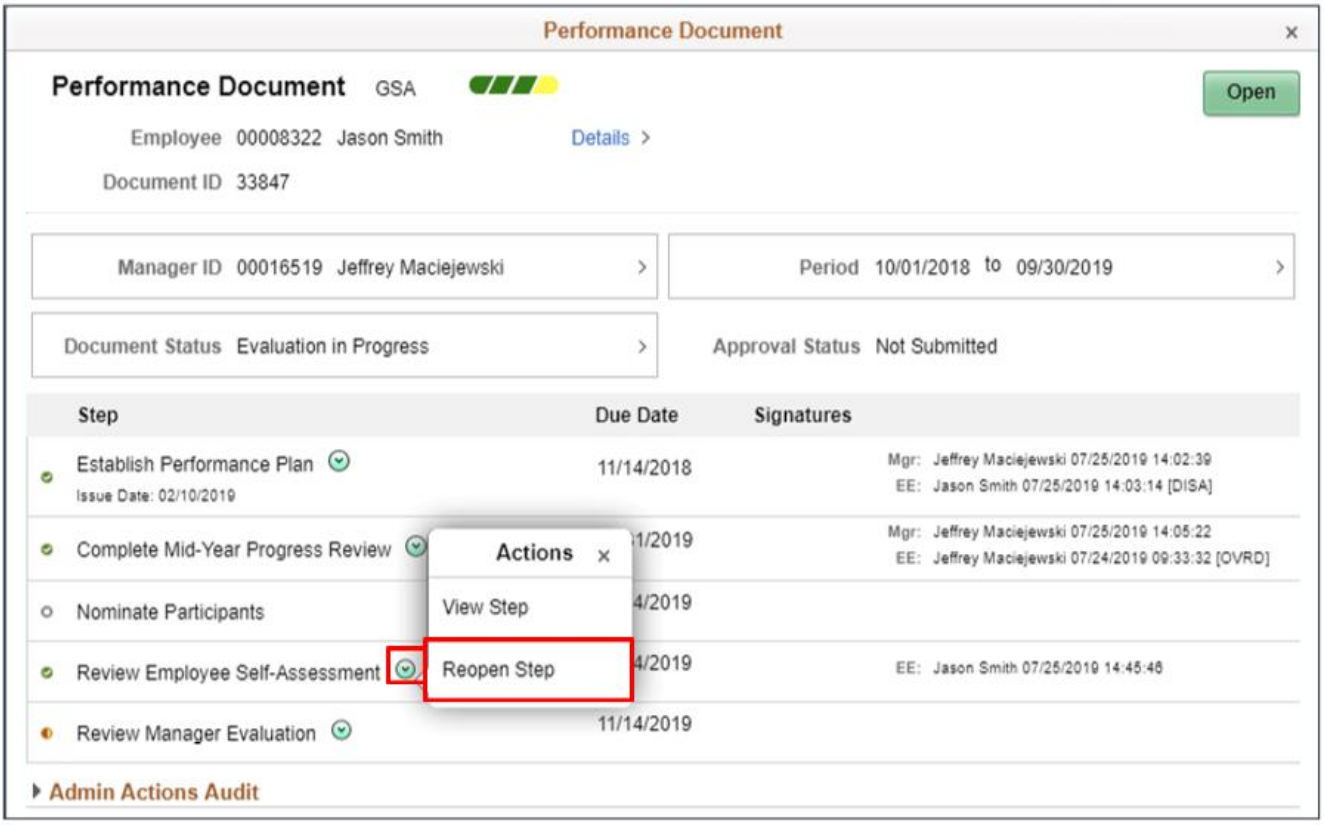


4 Select the document you wish to reopen for employee self-evaluation.

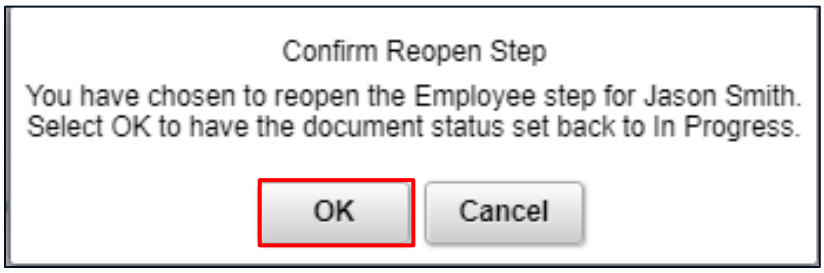


5 Select the Related Actions link.

6 Select Reopen Step.



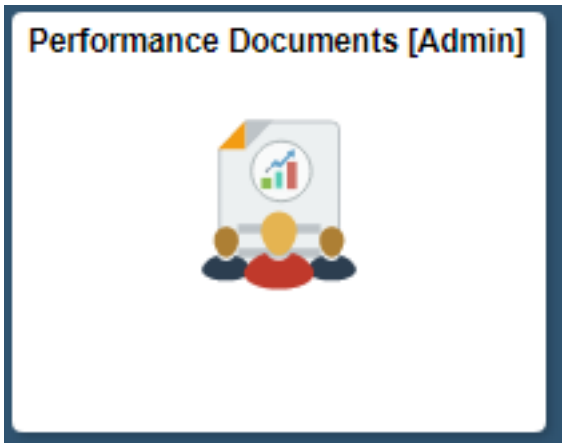
7 Select OK.



1.4.3 Reopen Mid-Year Review

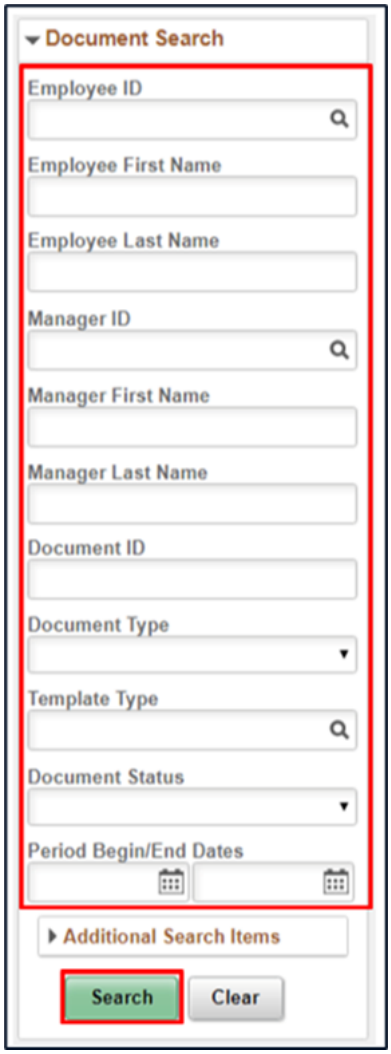
Roles: Administrator

1 Select the Performance Documents [Admin] tile.

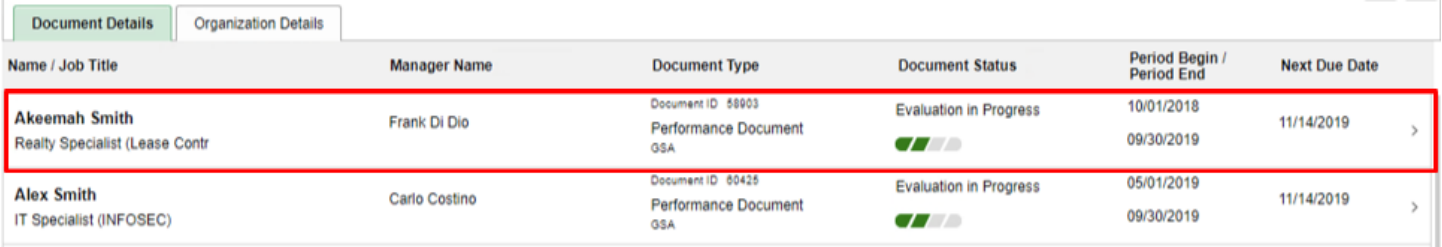


2 Enter search criteria to find the correct employee.

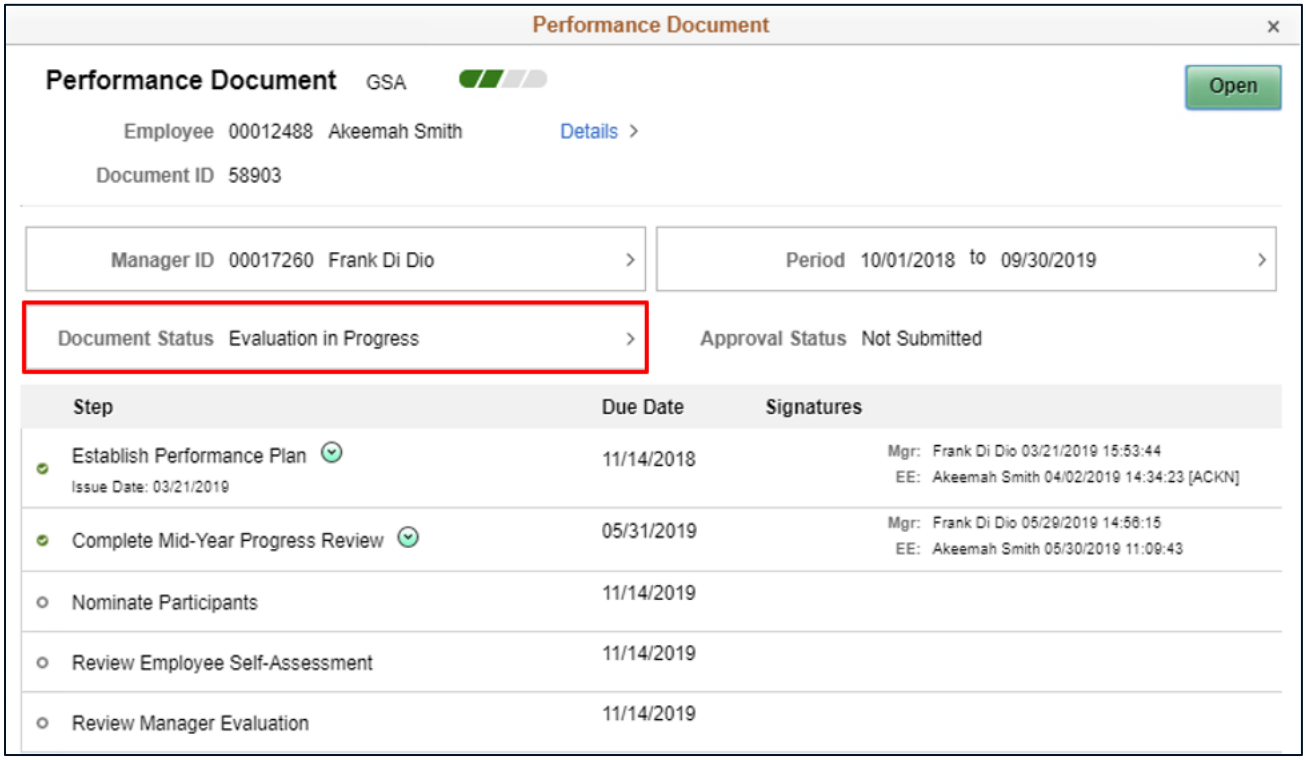
3 Select Search.



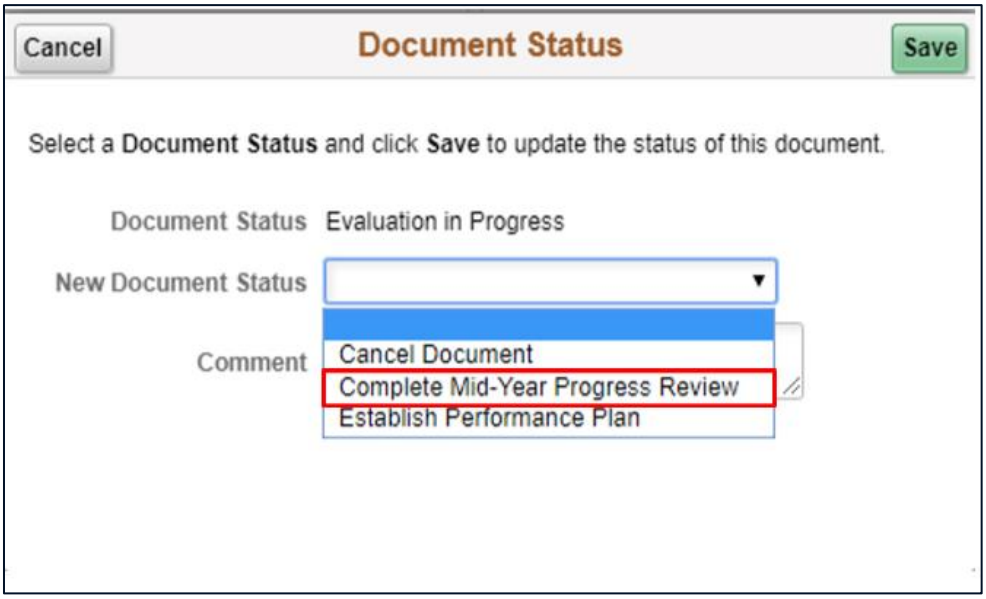
4 Select the performance document you wish to reopen.



5 Select the Document Status tab.

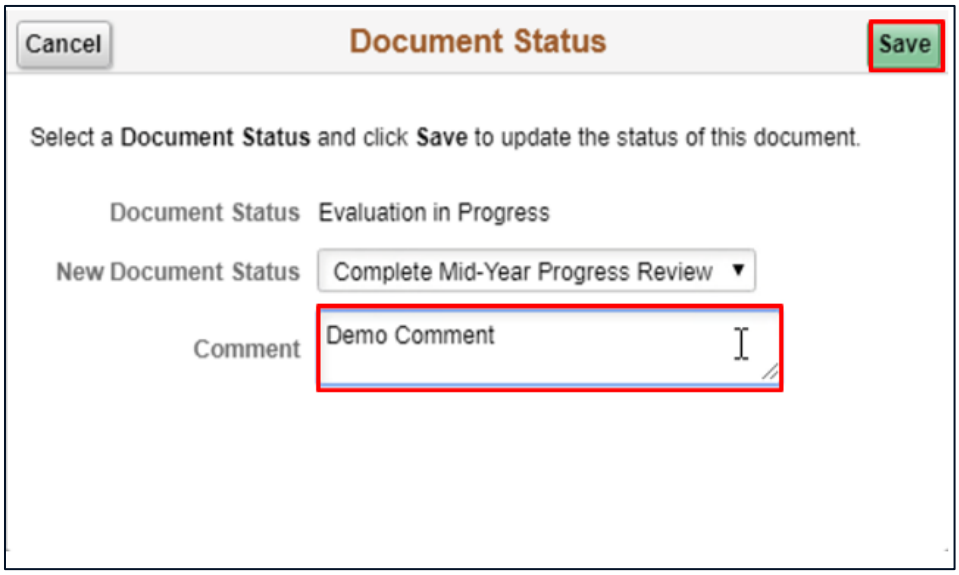


6 Select Complete Mid-Year Progress Review in the *New Document Status* drop-down.



7 Enter comments in the Comment field.

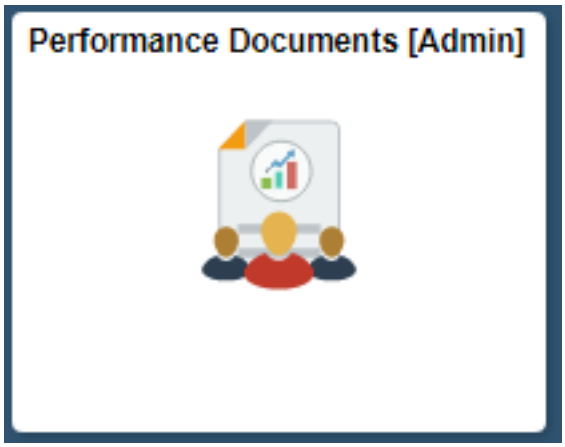
8 Select Save.



1.4.4 Reopen Peer Review

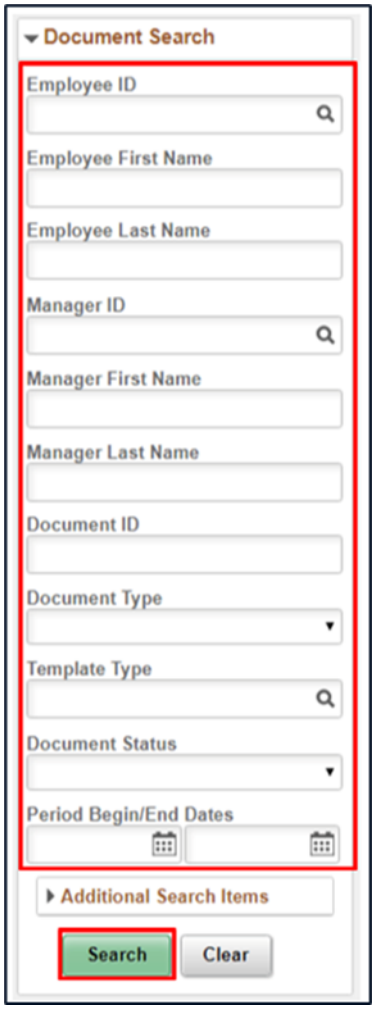
Roles: Administrator, Support

1 Select the Performance Documents [Admin] tile.

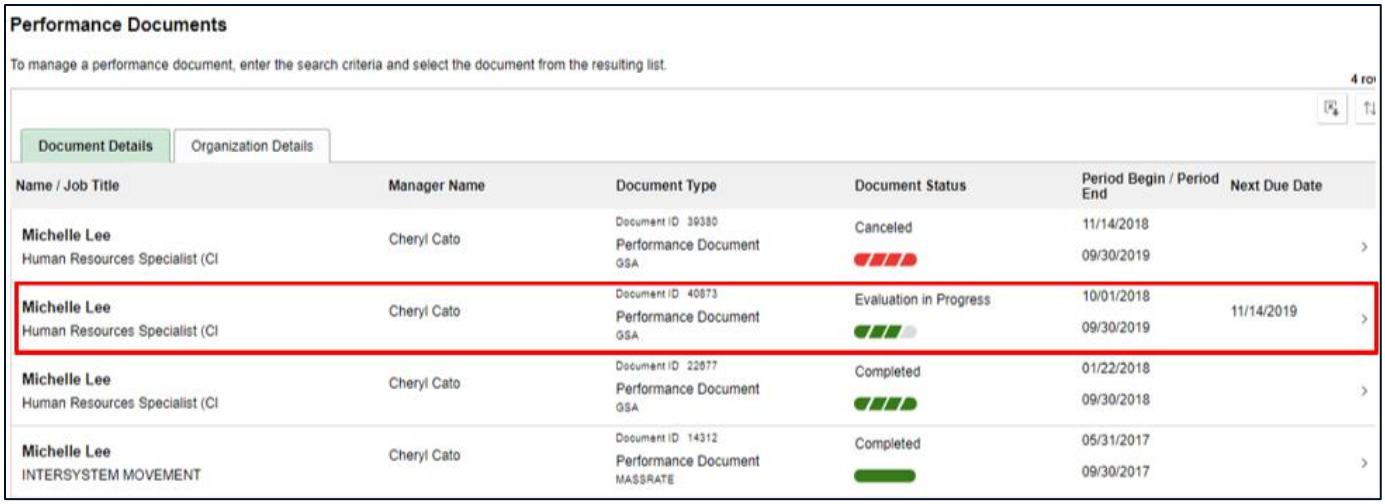


2 Enter search criteria to find the correct employee.

3 Select Search.

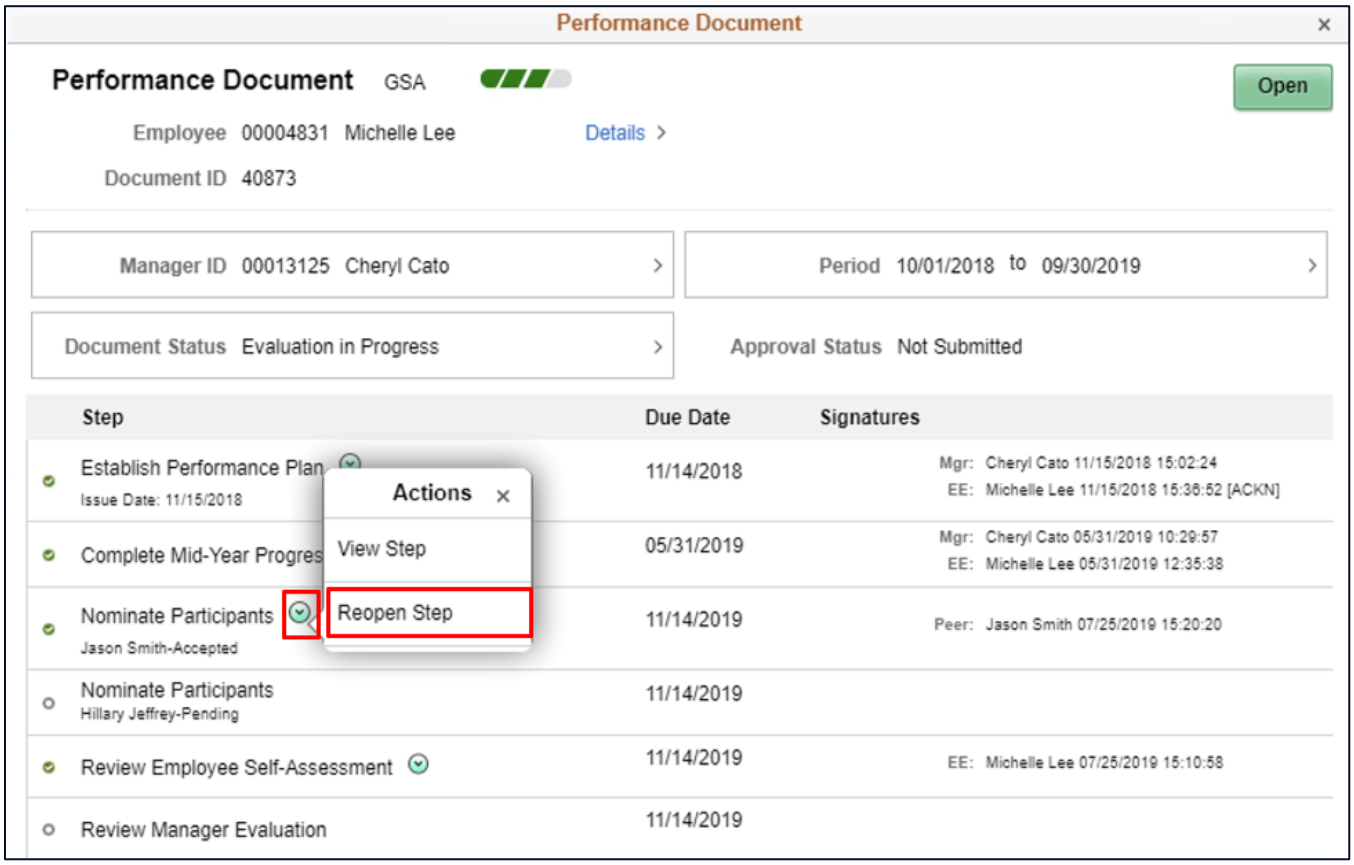


4 Select the performance document you wish to modify.

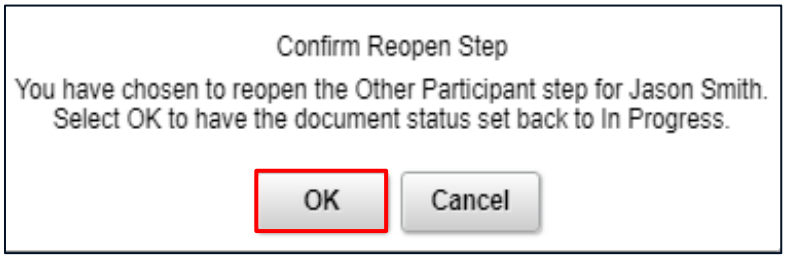


5 Under the *Nominate Participants* step, select the Related Actions arrow for the person to whom you want to push back an evaluation.

6 Select Reopen Step.

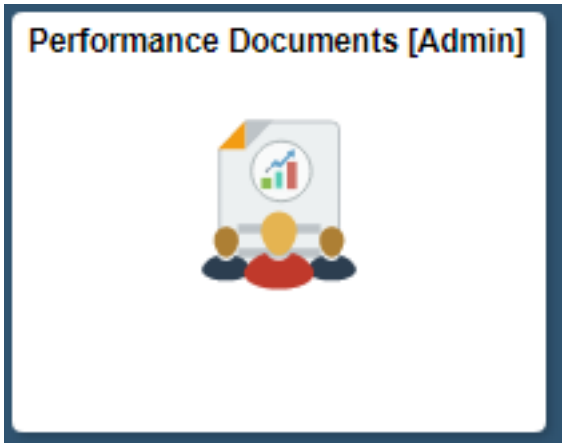


7 Select OK.



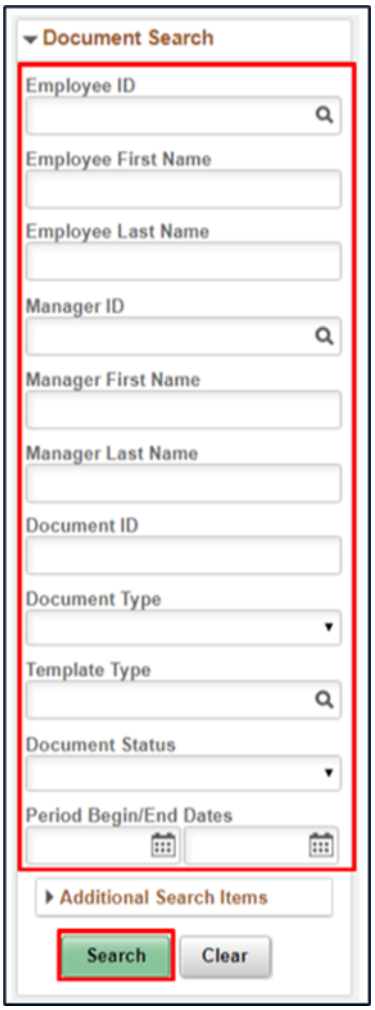
1.4.5 Reopen Final Evaluation

1 Select the Performance Documents [Admin] tile.

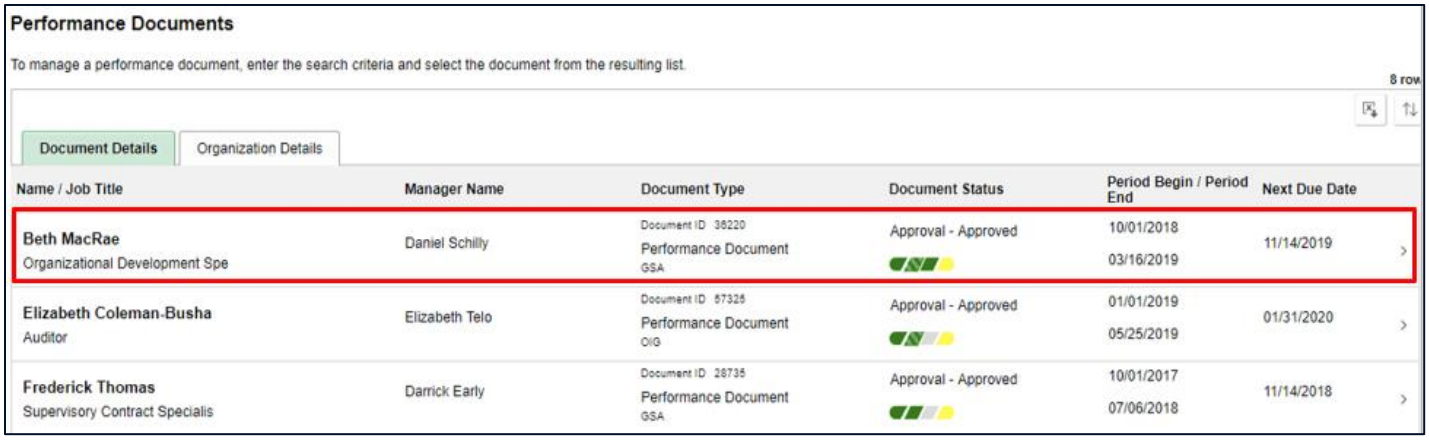


2 Enter search criteria to find the correct employee.

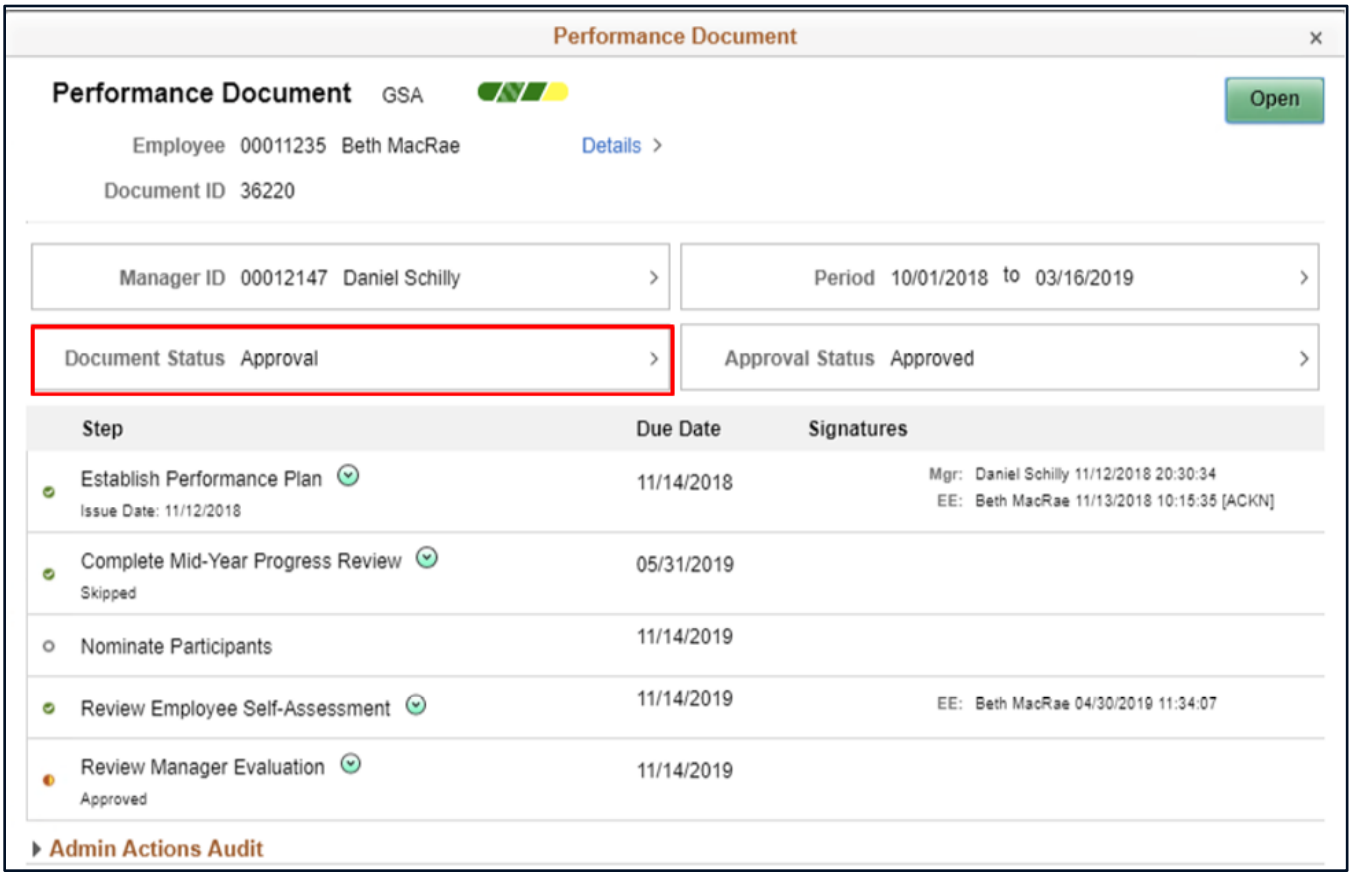
3 Select Search.



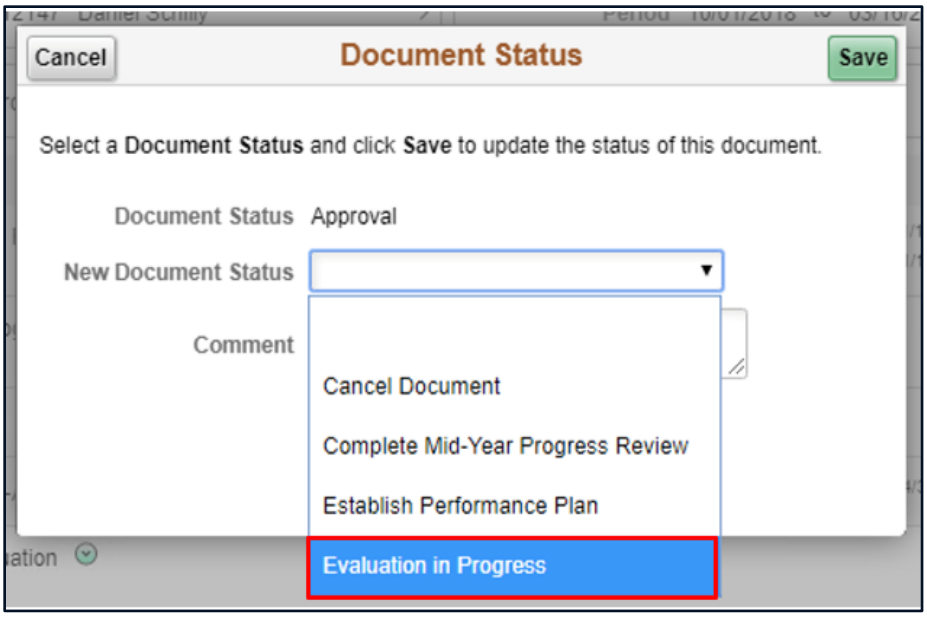
4 Select the performance document whose final evaluation you wish to reopen.



5 Select the Document Status tab.

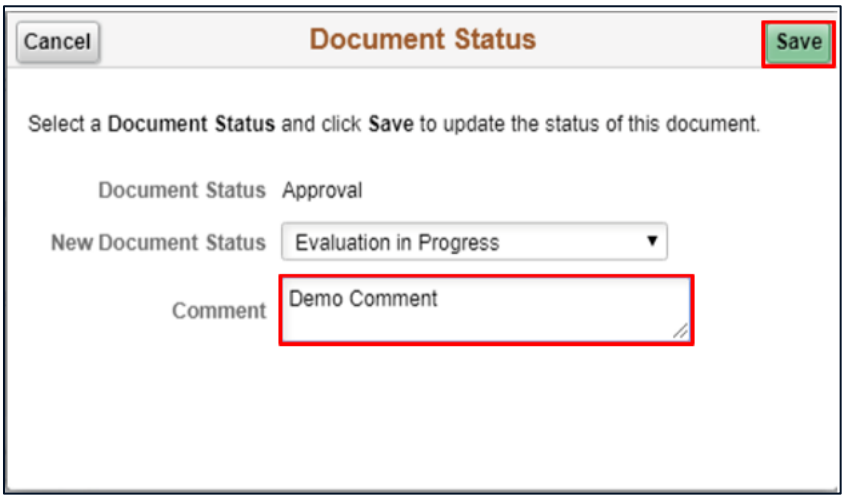


6 Use the *New Document Status* drop-down to select Evaluation in Progress.



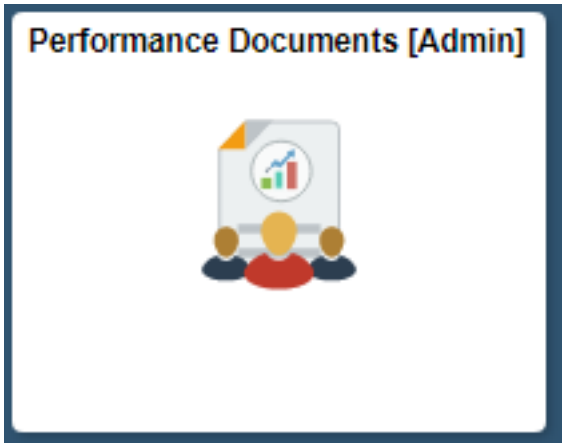
7 Enter comments in the Comment field.

8 Select Save.



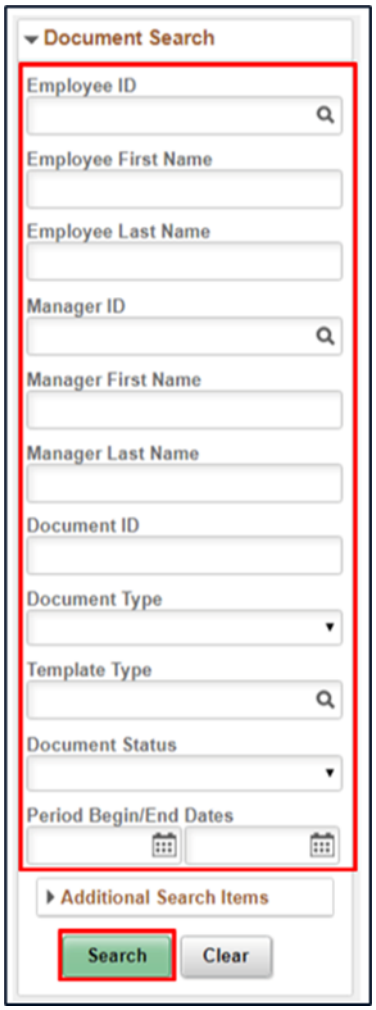
1.4.6 Cancel a Document

1 Select the Performance Documents [Admin] tile.

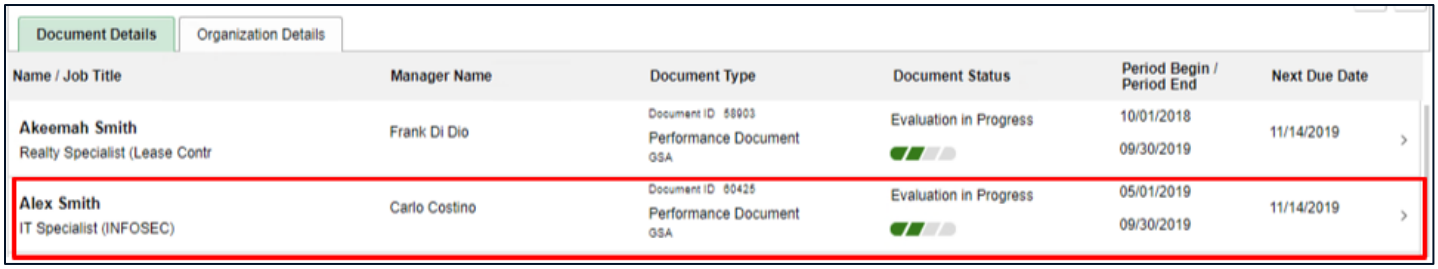


2 Enter search criteria to find the correct employee.

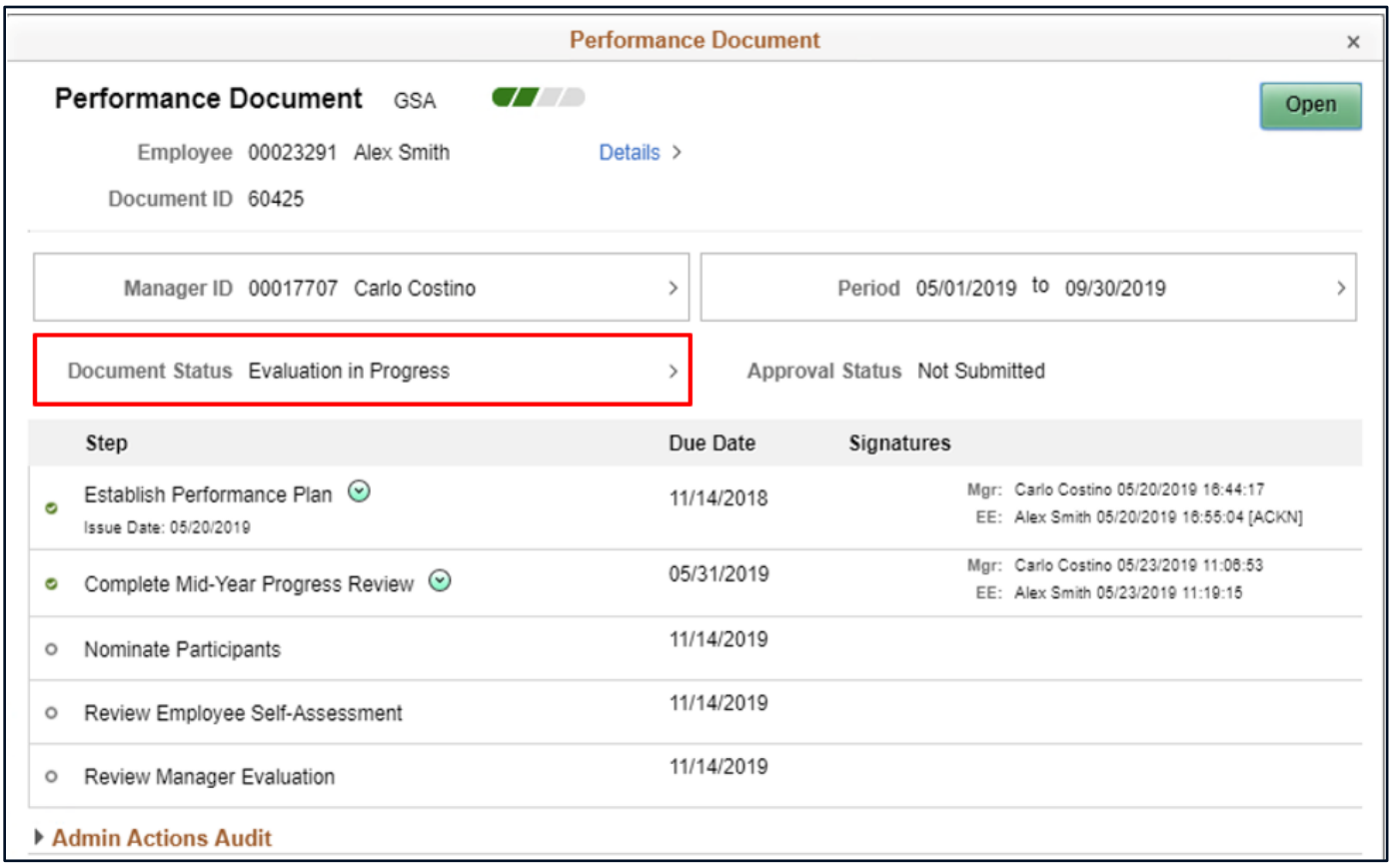
3 Select Search.



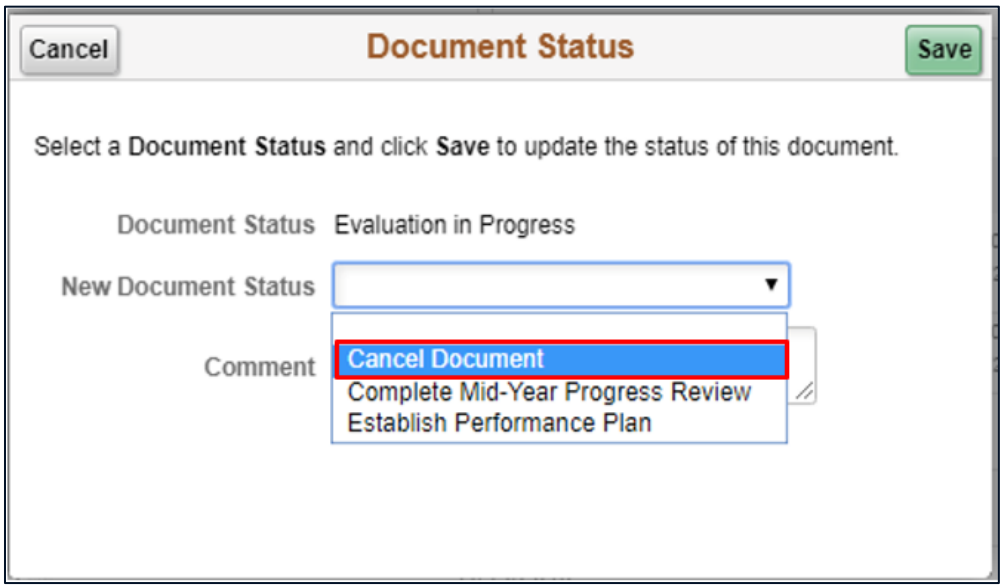
4 Select the performance document you wish to cancel.



5 Select the Document Status tab.

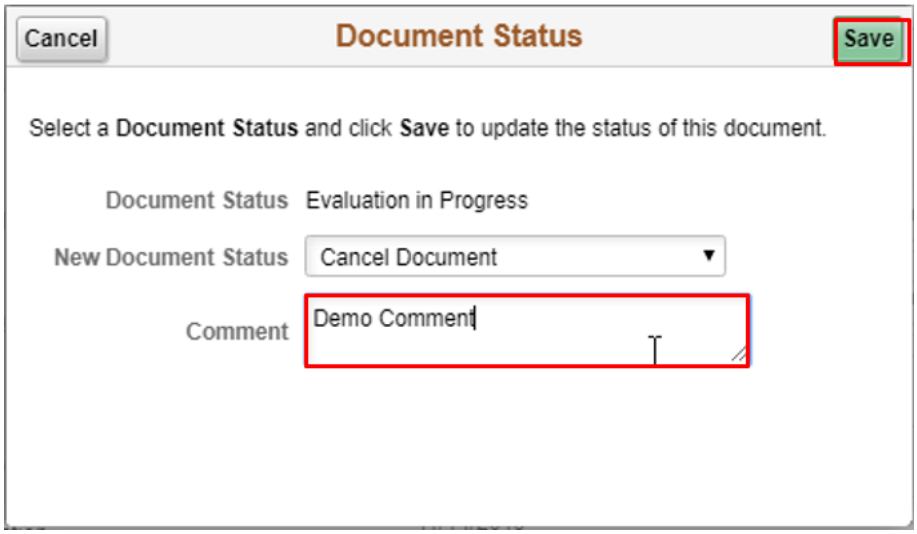


6 Select Cancel Document from the *New Document Status* drop-down.



7 Enter comments in the Comment field.

8 Select Save.



Topic 1.5: Mass Actions

1.5.1 Classic Transfer Document

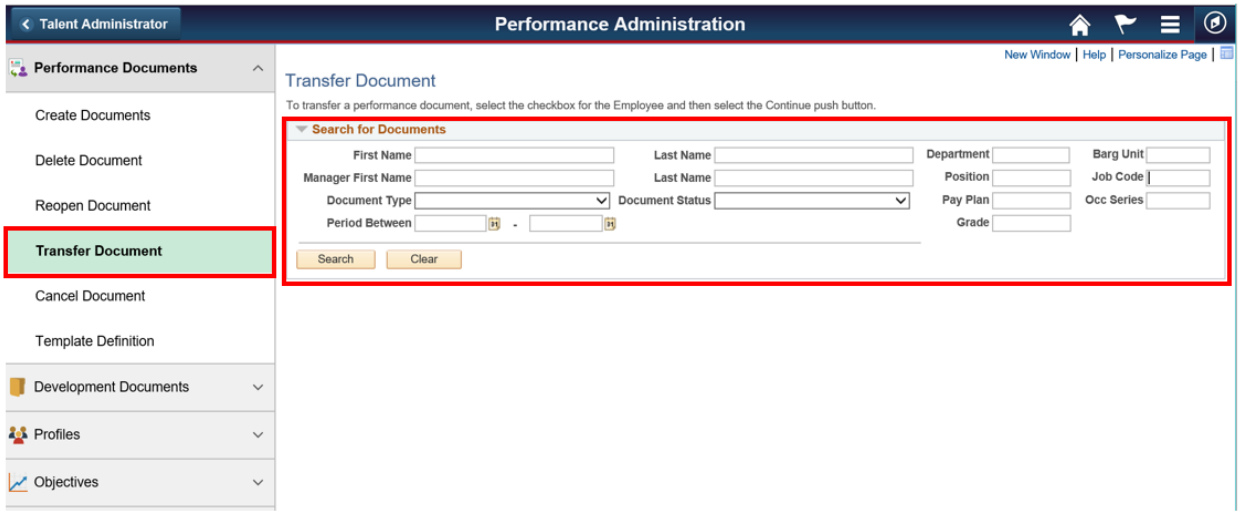
This topic will cover transferring a performance document in HR Links as an ePerformance Administrator.

1 To begin, navigate to the *Talent Administrator* homepage and select the Performance Administration tile.

2 Select Transfer Documents on the left navigation menu.

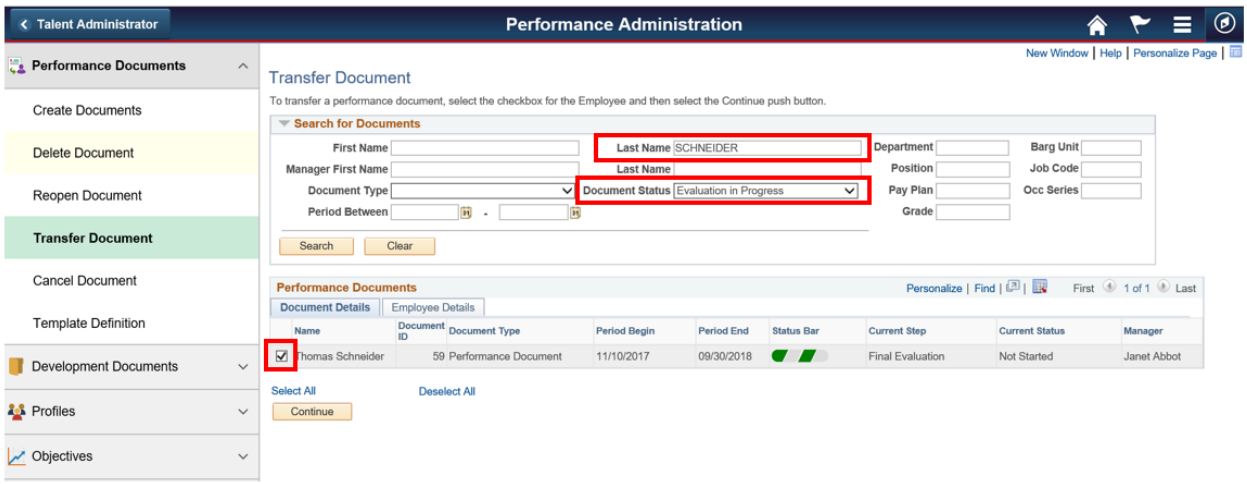
3 Enter applicable data in the *Search for Documents* fields to locate the correct performance document.

4 Select Search.

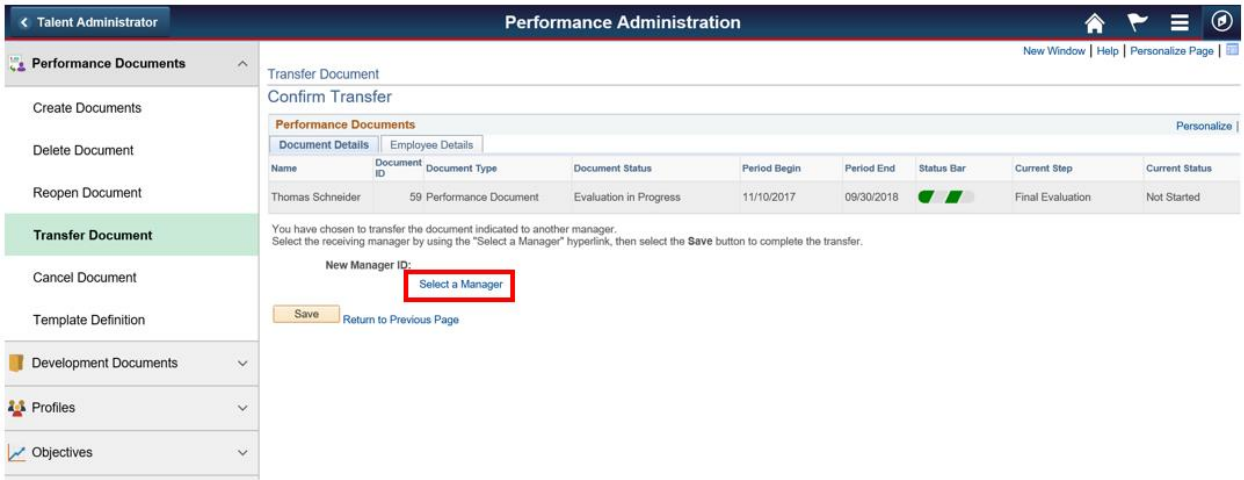


5 Select the correct performance document.

6 Select Continue.



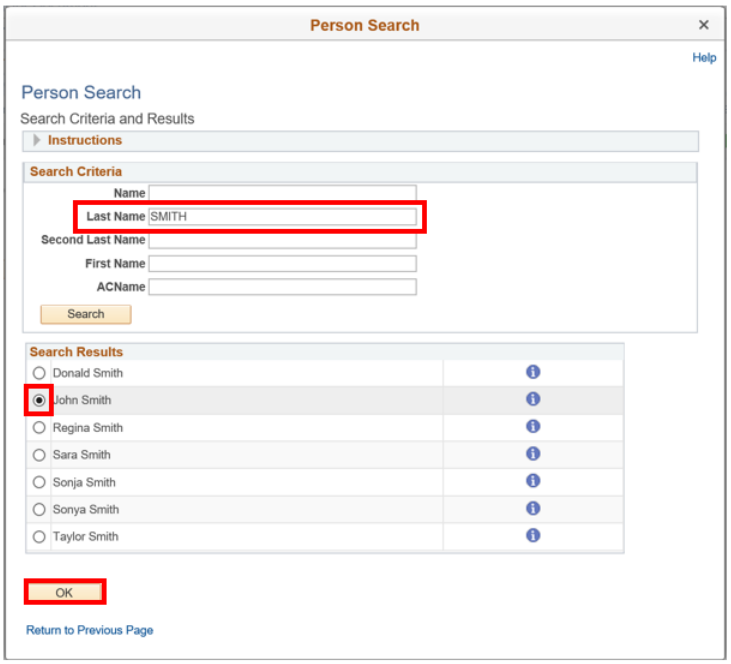
7 Select the Select a Manager link.



8 On the *Person Search* pop-up, enter search criteria applicable to the manager/employee you are transferring the document to.

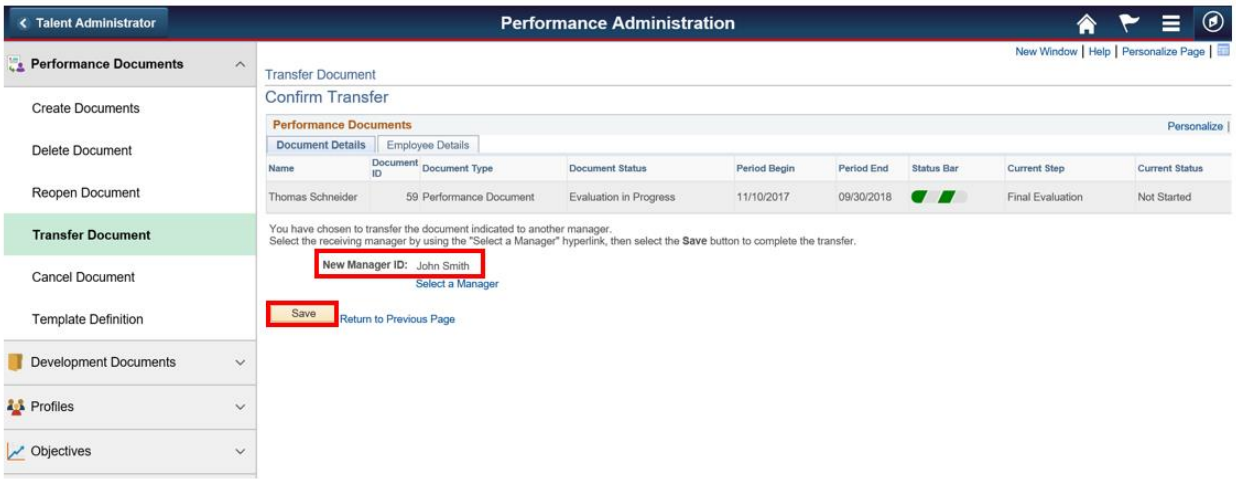
9 Select Search.

10 Select the radio button next to the correct employee and select OK.



11 Confirm the correct employee was selected.

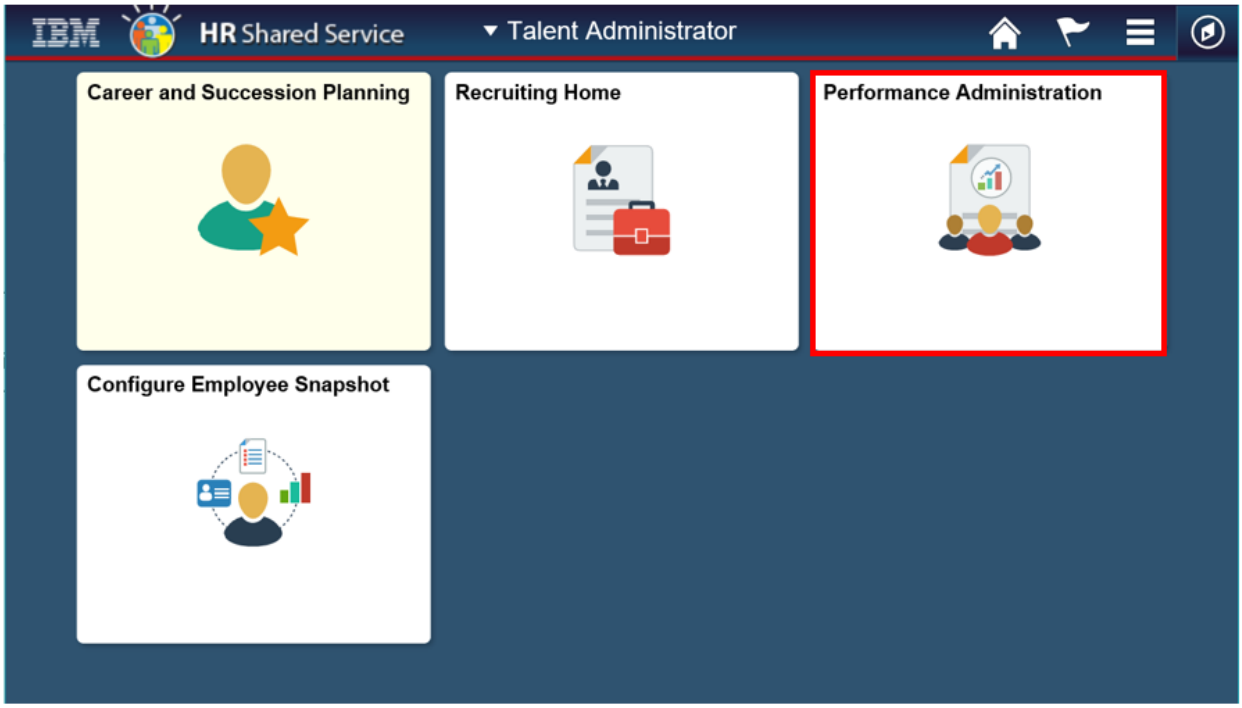
12 Select Save to confirm the transfer.



1.5.2 Classic Reopen Document

This topic will explain how to Reopen a document as an ePerformance Administrator. Throughout the performance appraisal cycle, Supervisors have the ability to reopen the Establish Performance Plan step in a performance document to make updates to the employee's performance plan. Once the Supervisor has signed the Manager Evaluation, the Supervisor can no longer Reopen, and only an ePerformance Administrator can complete the Reopen Document process.

1 To begin, navigate to the *Talent Administrator* homepage and select the Performance Administration tile.

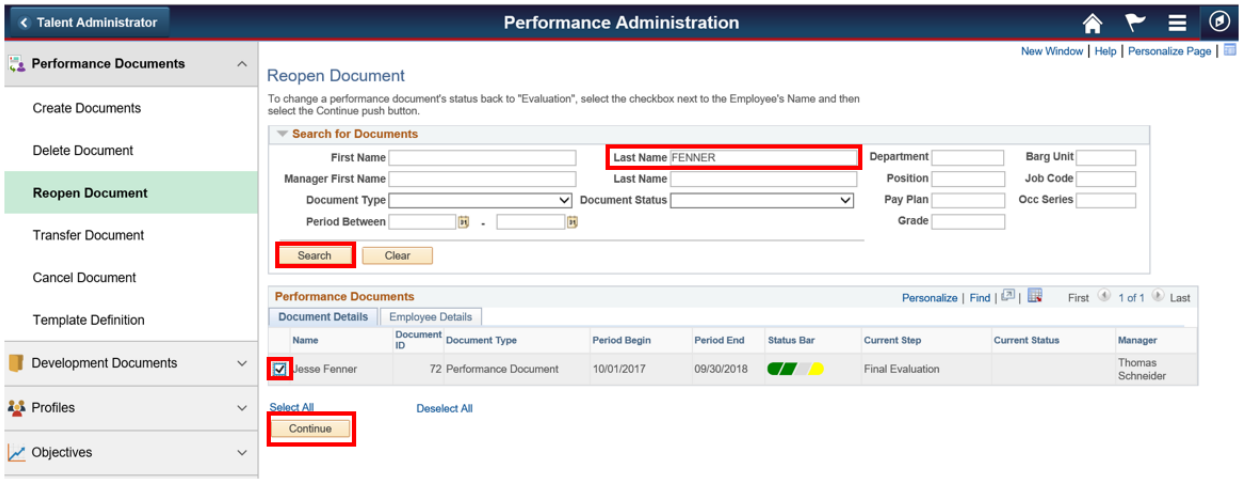


2 On the *Reopen Document* page, enter applicable search criteria to locate the document you wish to reopen.

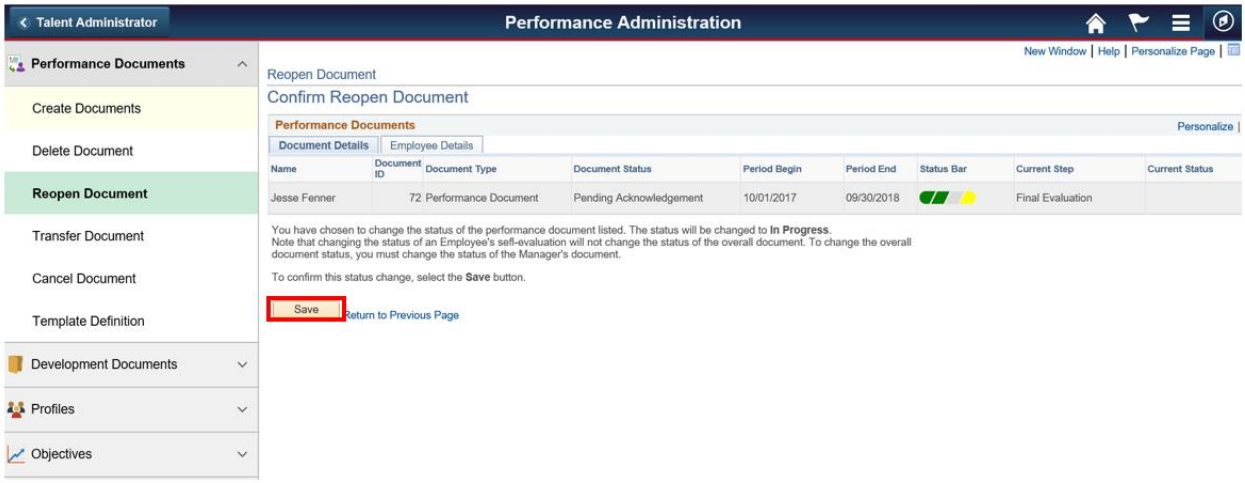
3 Select Search.

4 From the performance documents returned in your search results, select the checkbox next to the correct performance document.

5 Select Continue.



6 Select Save to confirm reopen.

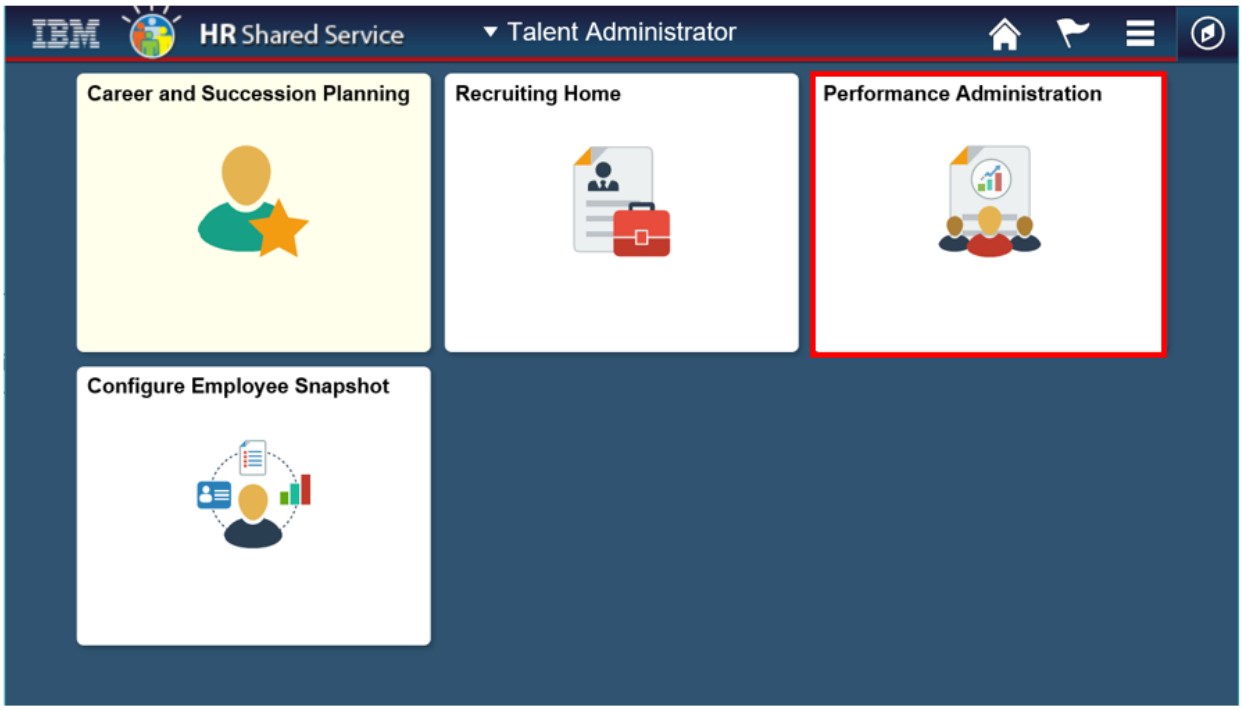


Manager Evaluation status is now *In Progress*. The Supervisor can now edit the Manager Evaluation, and can Reopen the Establish Performance Plan step, if necessary.

1.5.3 Classic Cancel Document

In this topic we will discuss the process of Cancelling a performance document as an ePerformance Administrator.

1 To begin, navigate to the *Talent Administrator* homepage and select the Performance Administration tile.

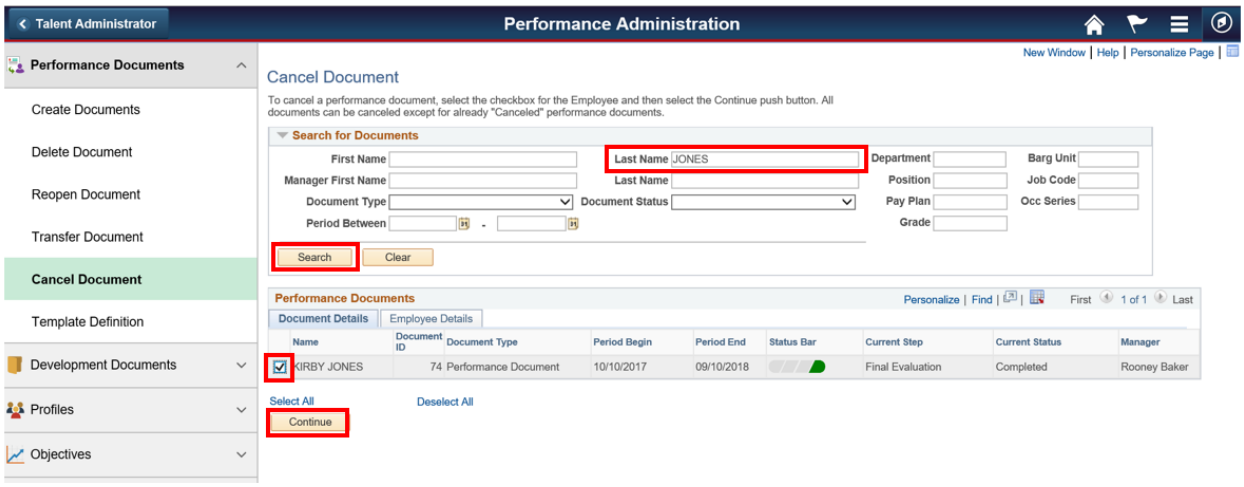


2 On the *Cancel Document* page, enter search criteria applicable to the document you wish to cancel.

3 Select Search.

4 Select the checkbox next to the correct document.

5 Select Continue.



6 On the *Confirm Cancellation* page, validate that the correct performance document has been selected.

7 Enter comments in the free-form text box to document the reason for cancelling.

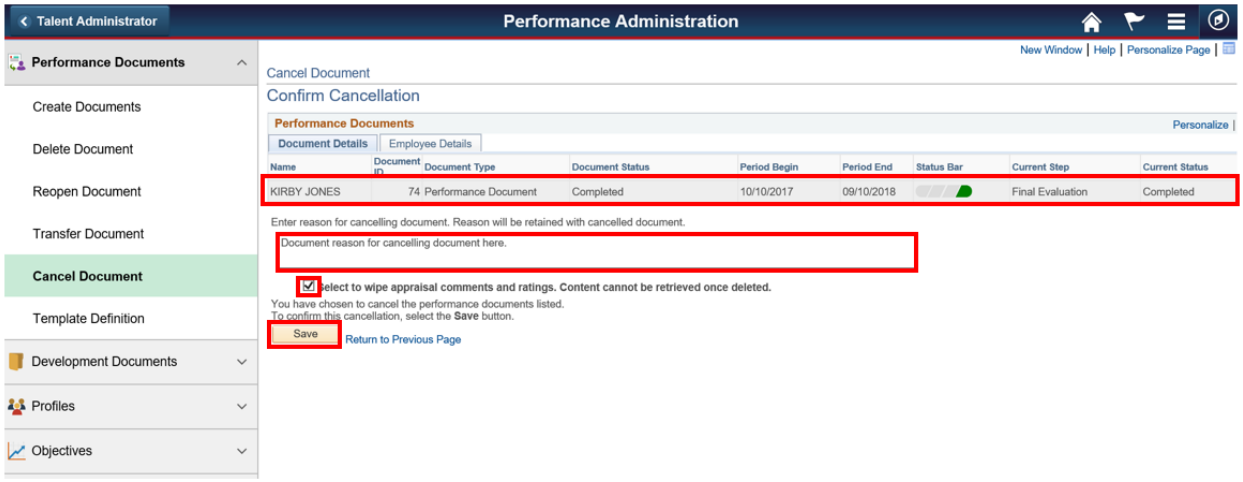
Note: This is a required field.

8 If you would like to permanently remove appraisal comments and ratings, select the checkbox next to "Select to wipe appraisal comments and ratings. Content cannot be retrieved once deleted."

9 If you would like to retain all appraisal comments and ratings but put the performance document in a Cancelled status, do not select this checkbox.

Note: If the checkbox to wipe appraisal comments was selected, you will receive a warning asking you to confirm your selection. Select OK to confirm.

10 Select Save.



The document is now in a Cancelled status.

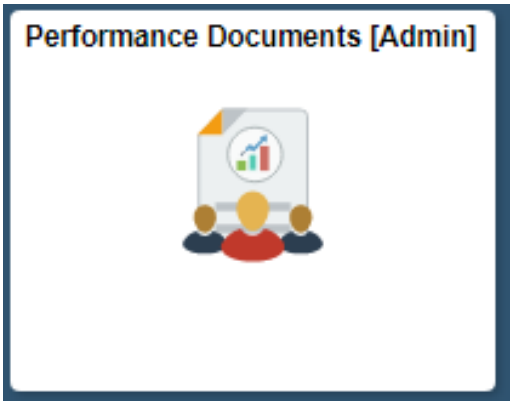
Topic 1.6: Other Actions

1.6.1 Modify Supervisor Level

Roles: Administrator

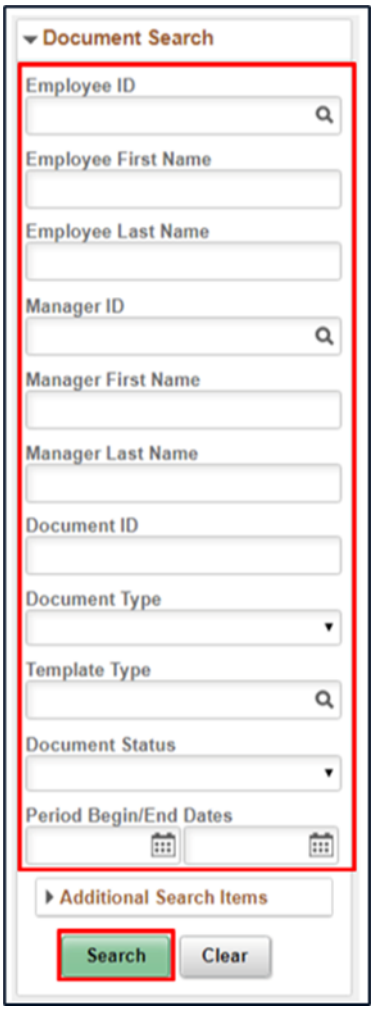
Note: Changing the Supervisor Level as seen in this section will affect the 40% Leadership criteria for some roles.

1 Select the Performance Documents [Admin] tile.

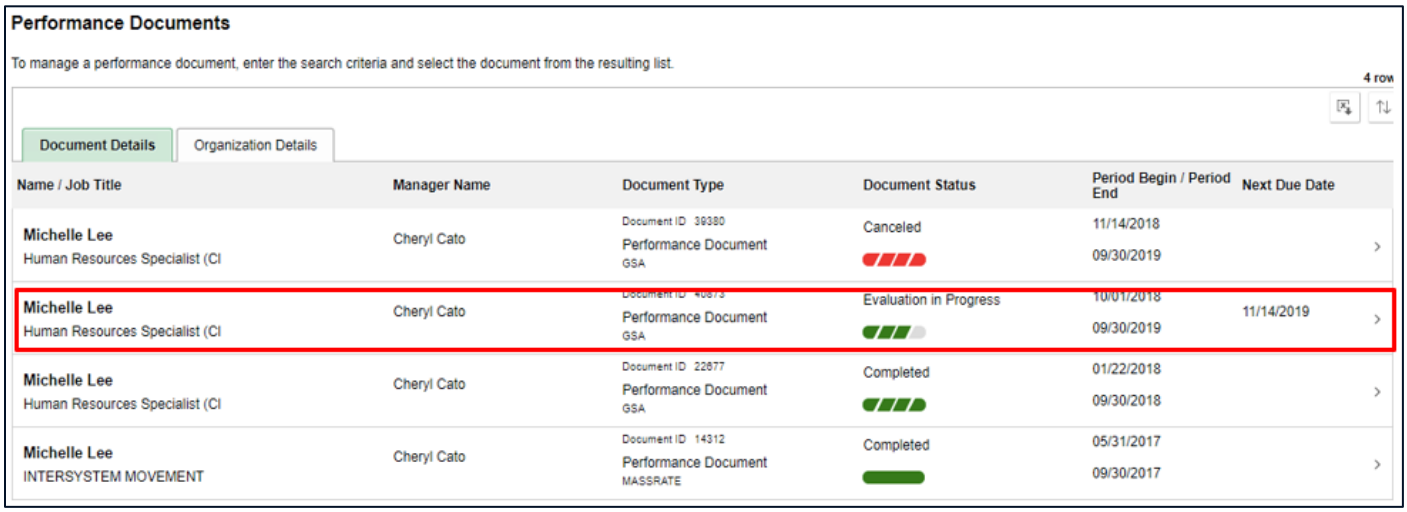


2 Enter search criteria to find the correct employee.

3 Select Search.

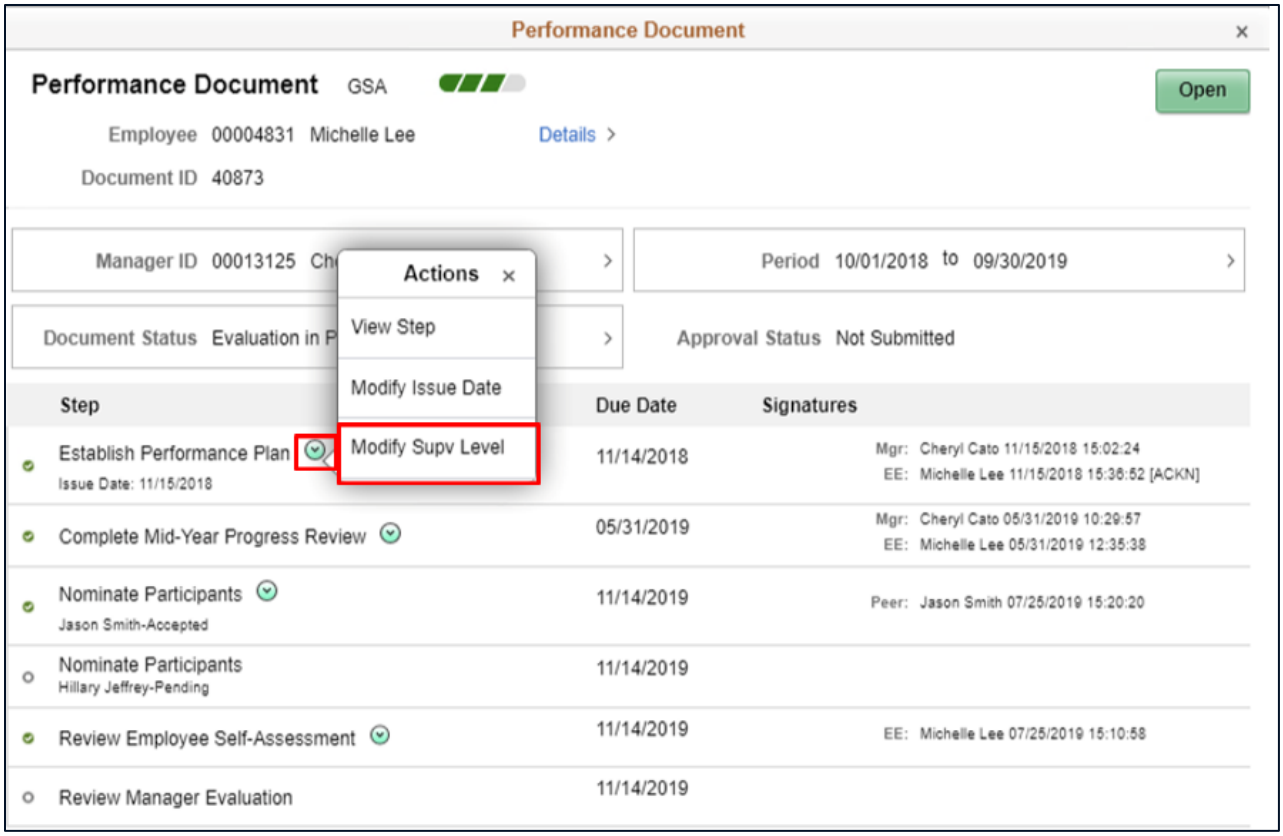


4 Select the performance document you wish to transfer.



5 Select the Related Actions arrow next to *Establish Performance Plan*.

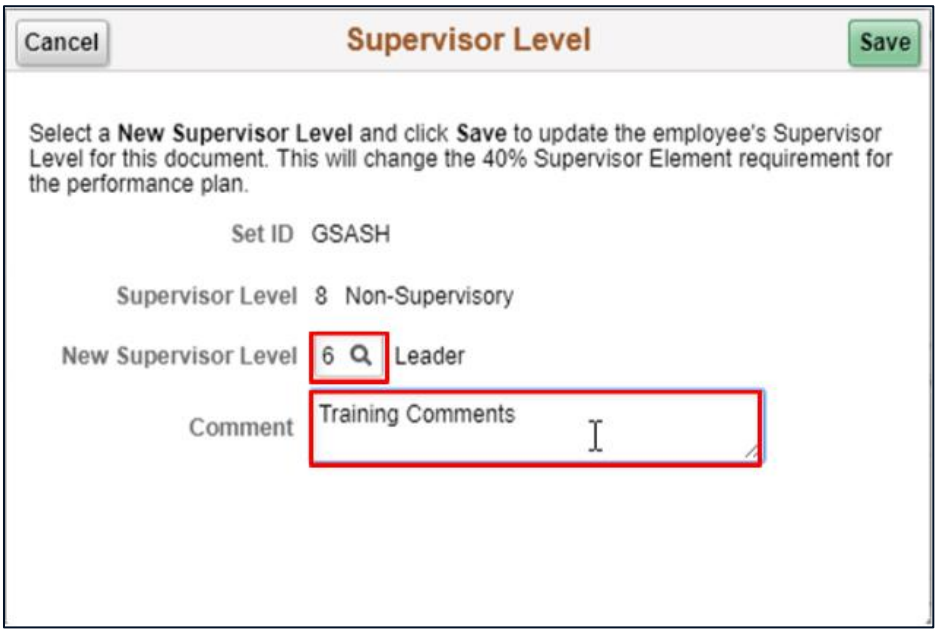
6 Select Modify Supv Level.



7 Enter a New Supervisor Level.

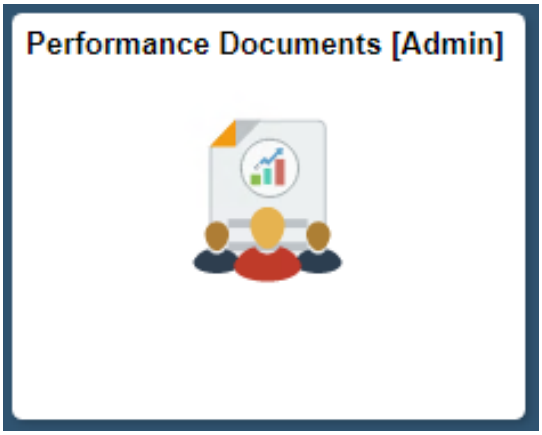
8 Enter comments in the Comments field.

9 Select Save.



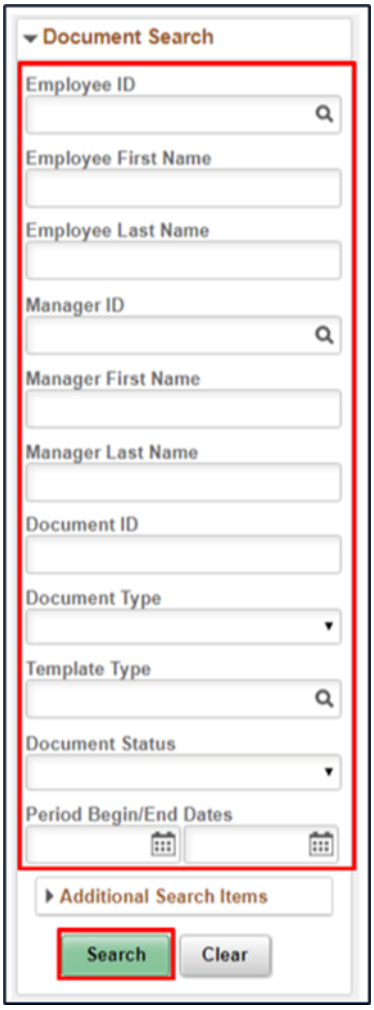
1.6.2 Override Evaluation

1 Select the Performance Documents [Admin] tile.



2 Enter the search criteria of the desired employee.

3 Select Search.



4 Select the document you wish to override from the search results.

James Watkins Contract Specialist	Bryon Boyer	Document ID 38424 Performance Document GSA	Approval - Approved	10/01/2018 09/30/2019	11/14/2019	›
Marjusz Lewandowski INTERSYSTEM MOVEMENT	Liliana Delbonifro	Document ID 23373 Performance Document GSA	Approval - Approved	10/01/2017 03/31/2018	11/14/2018	›
Mohammed Berlas Chief Information Security Off	Vanessa Ros	Document ID 57914 Performance Document GSA	Approval - Submitted	10/01/2018 09/30/2019	11/14/2019	›
Tammy Pior Building Information Specialis	Robert Henderson	Document ID 32459 Performance Document GSA	Approval - Approved	05/23/2018 11/28/2018	11/14/2018	›

5 Select the Approval Status tab.

Performance Document ×

Performance Document GSA

Open

Employee 00006198 Mohammed Berlas Details ›

Document ID 57914 Level 5 Outstanding

Manager ID 00018405 Vanessa Ros ›

Period 10/01/2018 to 09/30/2019 ›

Document Status Approval ›

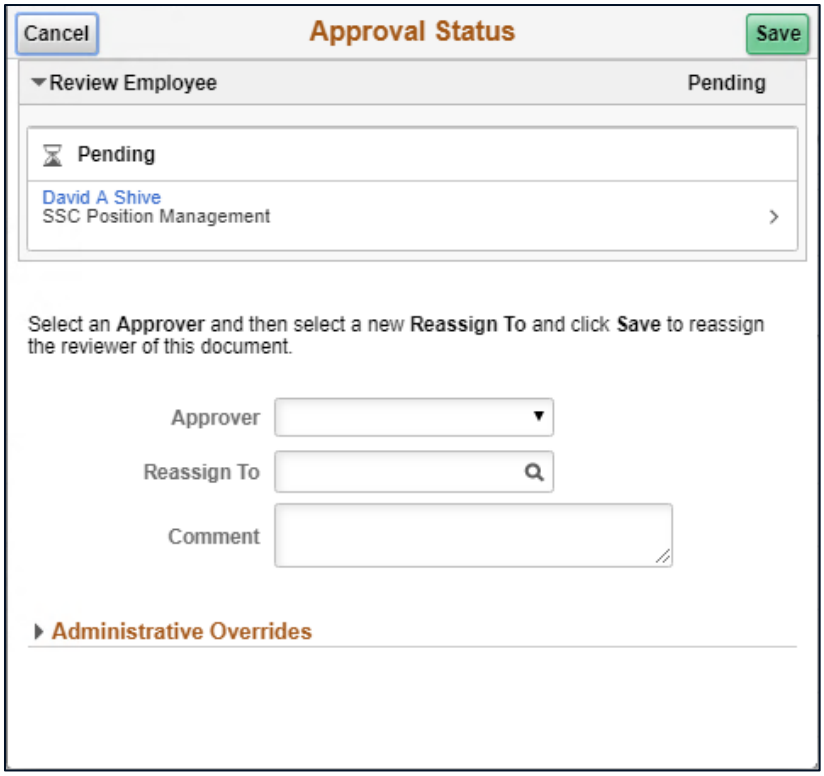
Approval Status Submitted ›

Step	Due Date	Signatures
Establish Performance Plan Issue Date: 02/27/2019	11/14/2018	Mgr: Vanessa Ros 02/27/2019 11:45:58 EE: Mohammed Berlas 02/27/2019 12:07:35 [ACKN]
Complete Mid-Year Progress Review Skipped	05/31/2019	
Nominate Participants	11/14/2019	
Review Employee Self-Assessment	11/14/2019	
Review Manager Evaluation Pending Approval	11/14/2019	

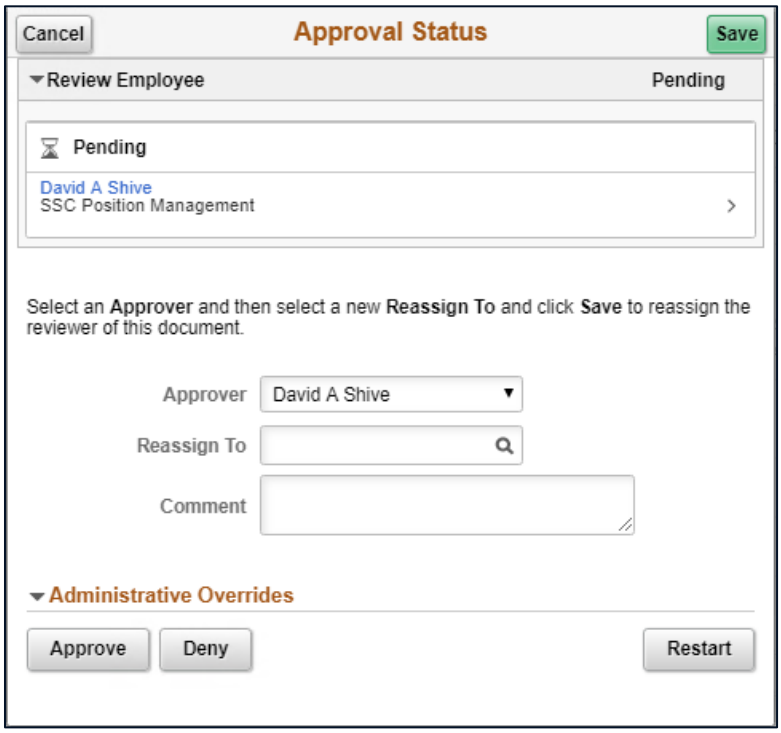
Admin Actions Audit

6 Use the Approver drop-down to select the Approver whose tasks are being overridden.

7 Select the arrow to open the Administrative Overrides section.



8 Select the Approve, Deny, or Restart button to override the document status.



9 The document is immediately placed in the new status. The audit log will display an Administrator Override.

Section 2: Create and Manage Business Objectives

Topic 2.1: Create Business Objectives

This topic will cover creating business objectives. Business Objectives are organizational goals/objectives that are cascaded down to employee performance plans, to align to performance elements.

As an ePerformance Administrator, you can complete every step in the process of creating and cascading business objective, or you can assign another user as the business objective owner. While a business objective owner can update and submit objectives for publication, only an ePerformance Administrator can publish the objectives.

To begin the process of creating business objectives, you need to identify at what organizational level you want to add objectives. The example below demonstrates how organizational objectives are cascaded down to lower level organizations when the lower level organization does not add objectives. For example, organization A published organizational objectives, but organizations B, D and E did not. Based on the organizational hierarchy, the objectives from A will automatically cascade down to organizations B, D and E.

On the right side of the organizational tree, organizations C and G have published organizational objectives, but organization F does not. Based on the organizational hierarchy, the objectives from organization C will flow down to organization F.

In the graphic below, the cascading of objectives we discussed above is represented using colors. All organizational "nodes" shown in the same color will have the same organizational objectives available to align to performance elements.

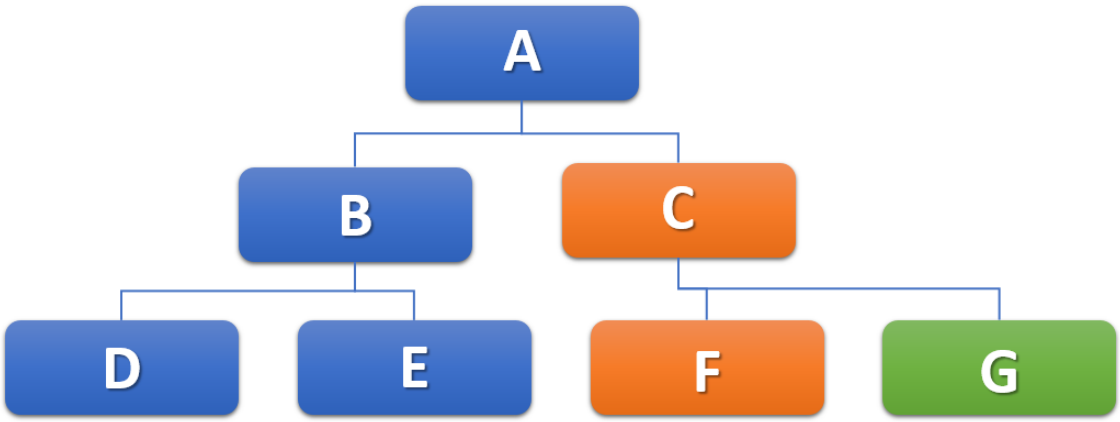


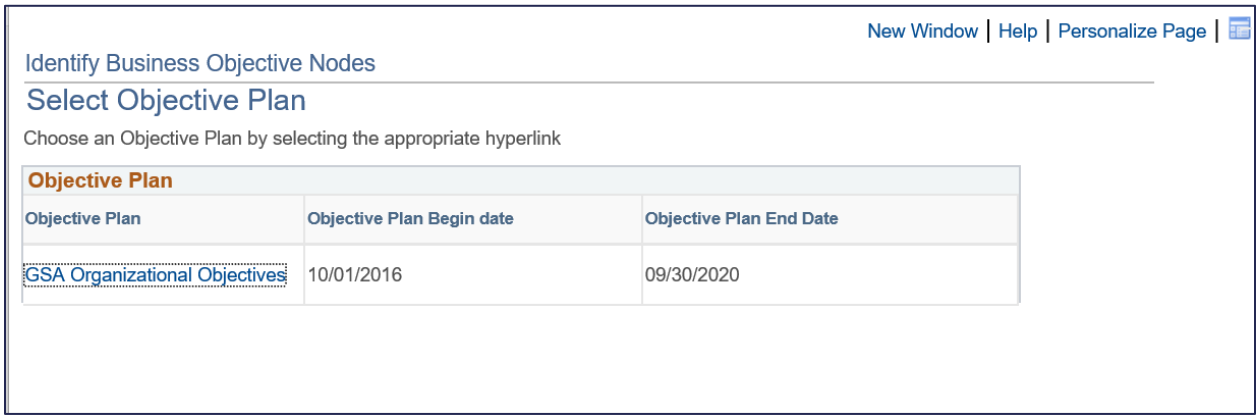
Figure 1: Cascading Organizational Objectives

To begin, identify the organizational "nodes" that will be adding business objectives.

2.1.1 Identify Objective Nodes

Navigation: Main Menu > Workforce Development > Performance Management > Business Objectives and Identify Objective Nodes

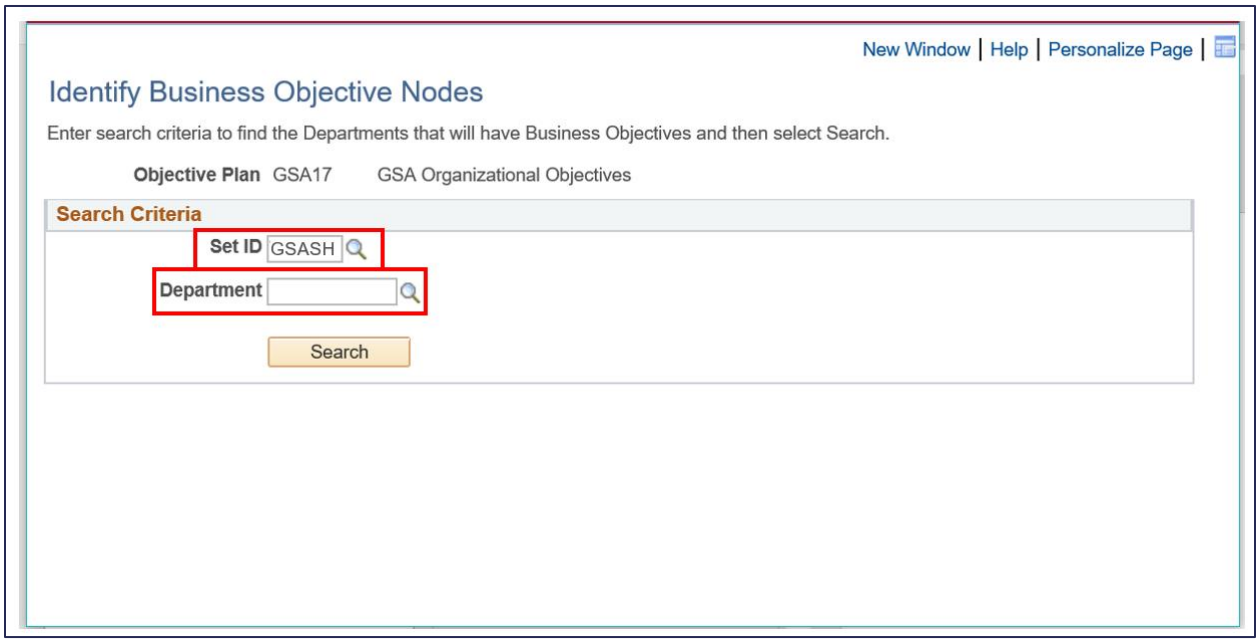
1 Select the GSA Organizational Objectives plan.



2 In the *Set ID* field, GSASH is pre-populated.

3 Select the magnifying glass next to the *Department* field to view and select the Department for which you want to add business objectives.

4 Select Search.



5 If there are departments reporting to the department selected, they will be shown in a table below the *Target Department* table, in the *Direct Reports* table. Select all of the Departments for which you want to add organizational objectives.

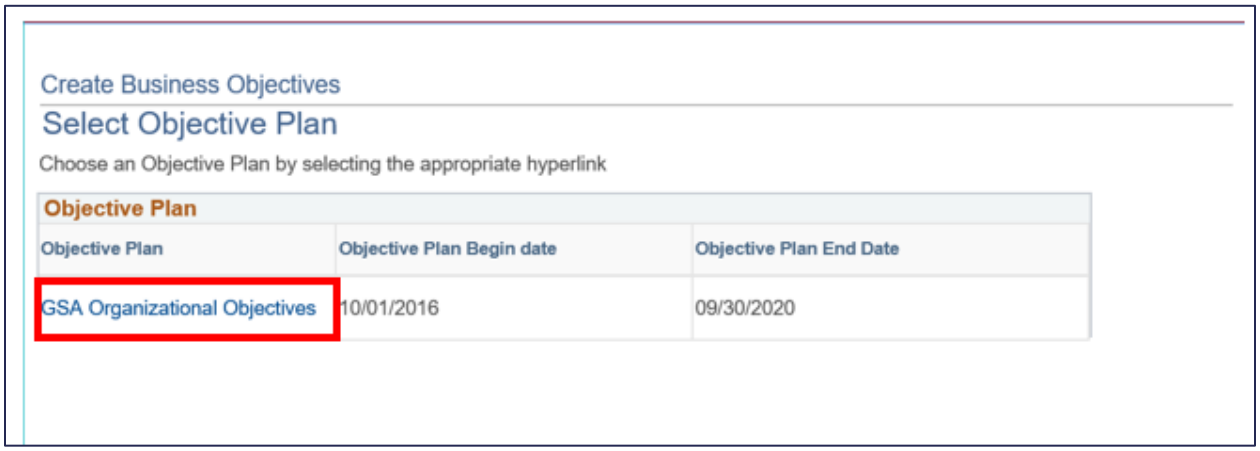
6 Select Save.

Next, create business objectives for the identified organizational nodes.

2.1.2 Create Business Objectives

Navigation: Main Menu > Workforce Development > Performance Management > Business Objectives > Create Business Objectives.

1 Select GSA Organizational Objectives



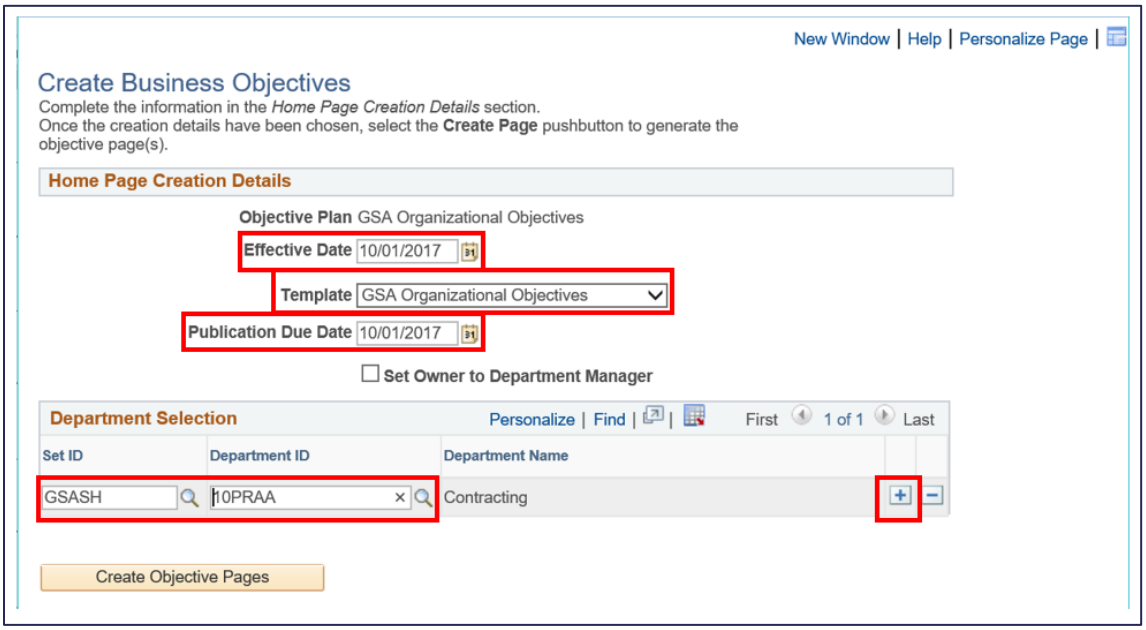
2 On the *Create Business Objectives* page, select the applicable dates for the Effective Date and Publication Due Date fields.

3 Select GSA Organizational Objectives from the *Template* drop-down menu.

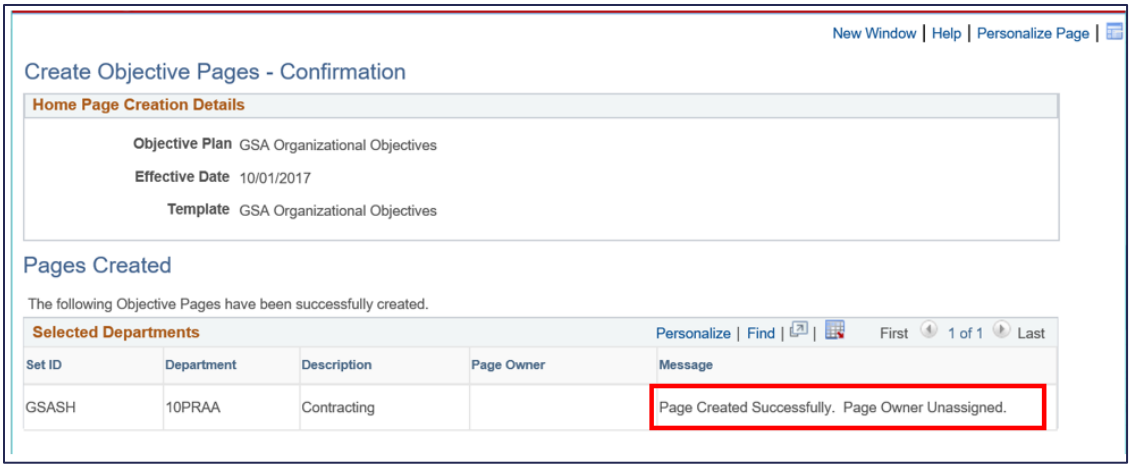
4 Select GSASH from the *Set ID* menu and select the *Department ID*.

5 If you would like to apply the same template to multiple Departments, select the Add (+) button in the *Department Selection* table.

6 Select Create Objective Pages.



7 Review the message on the *Create Objective Pages – Confirmation* page. In the example below, a page owner has not been assigned.



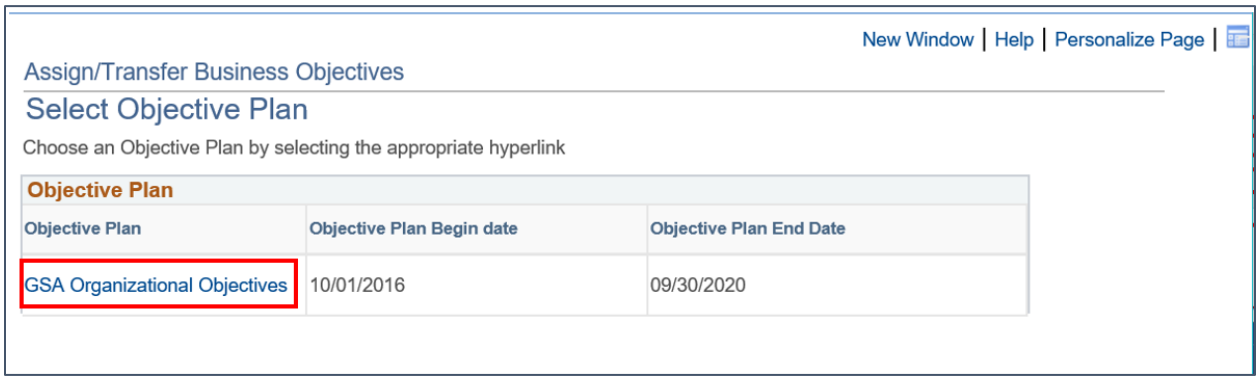
Next, assign a business objective owner.

2.1.3 Assign/Transfer Business Objectives

This action is only to be completed when existing business objectives are present within the system. To manage existing business objectives, perform the following steps:

Navigation: Main Menu > Workforce Development > Performance Management > Business Objectives > Administer Business Objectives > Assign/Transfer Objectives.

1 Select GSA Organizational Objectives.

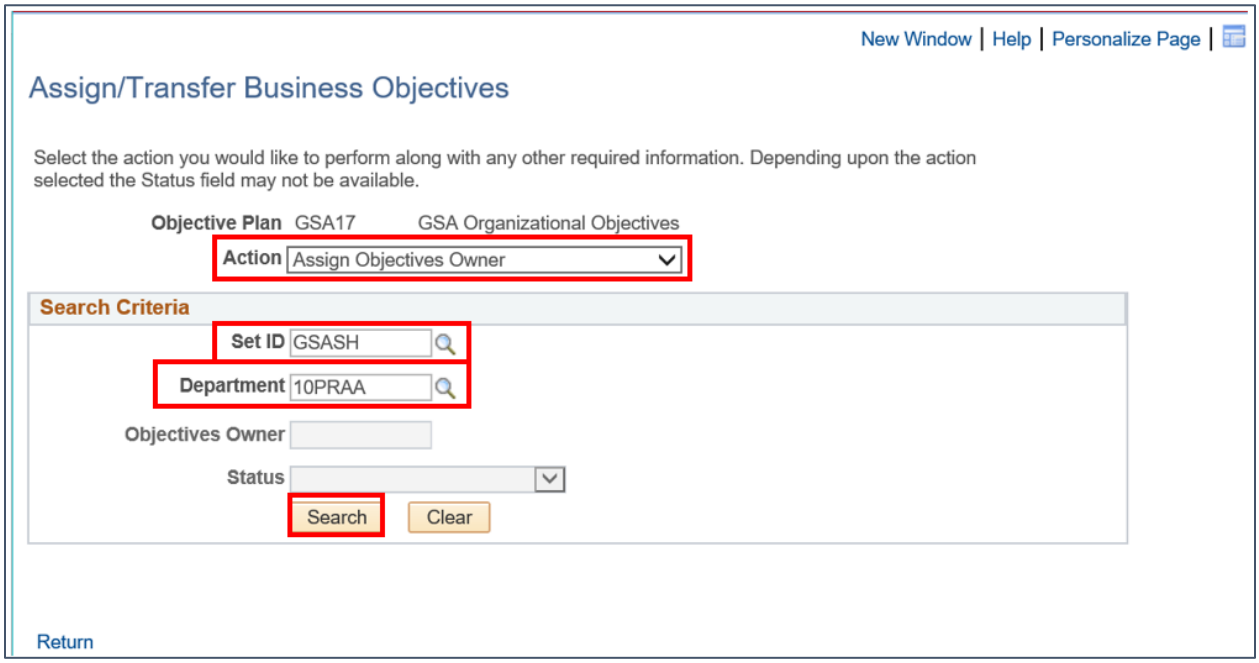


2 Select Assign Objectives Owner from the *Action* drop-down menu.

3 Select GSASH from the *Set ID* menu.

4 Select the appropriate *Department*.

5 Select Search.



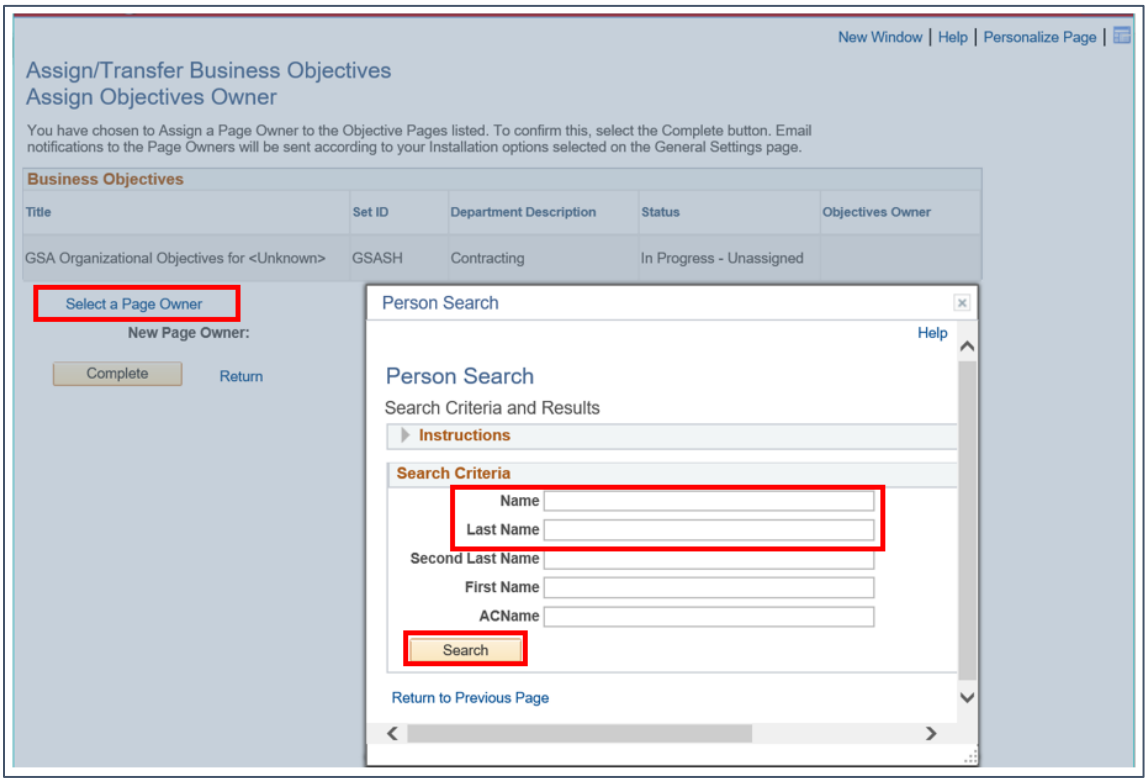
6 Select the checkbox next to the applicable *Departments* and select Continue.

7 On the *Assign Objectives Owner* page, select Select a Page Owner.

8 Search for the desired business objectives owner using the *First Name* and *Last Name* fields.

9 Select Search.

10 Select the radio button next to the correct employee and select OK.



11 Select Complete

One the objective owner is assigned, either the ePerformance Administrator or the Objective Owner can update the objectives using the *Manage Objectives* component, discussed below.

Topic 2.2: Manage Business Objectives

2.2.1 Manage Business Objectives

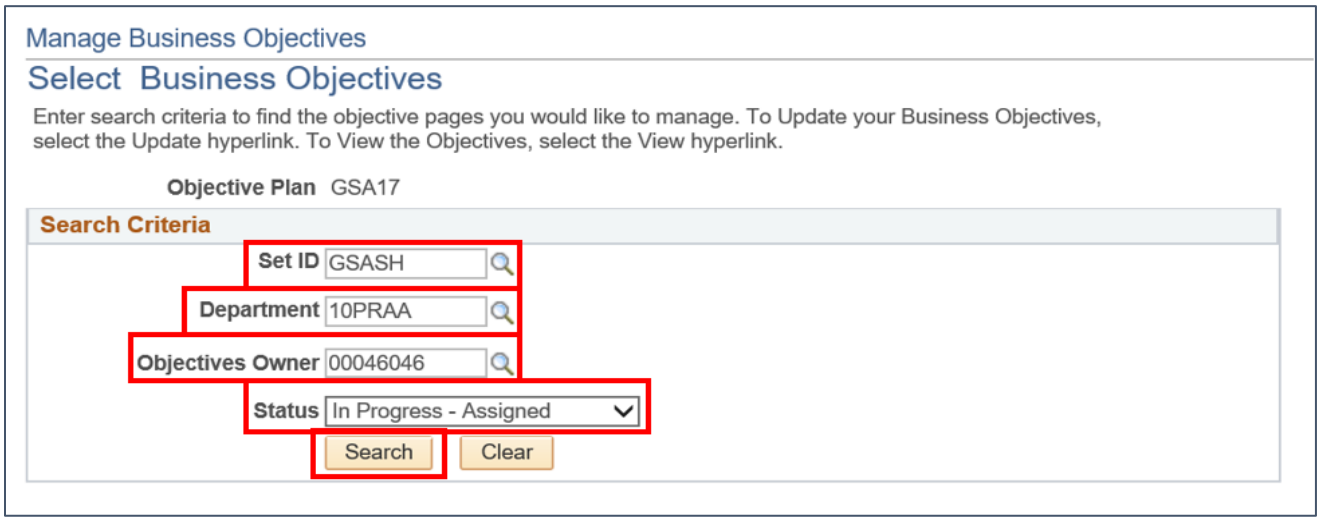
This action is only to be completed when existing business objectives are present within the system. To manage existing business objectives, perform the following steps:

Navigation: Main Menu > Workforce Development > Performance Management > Business Objectives > Manage Business Objectives.

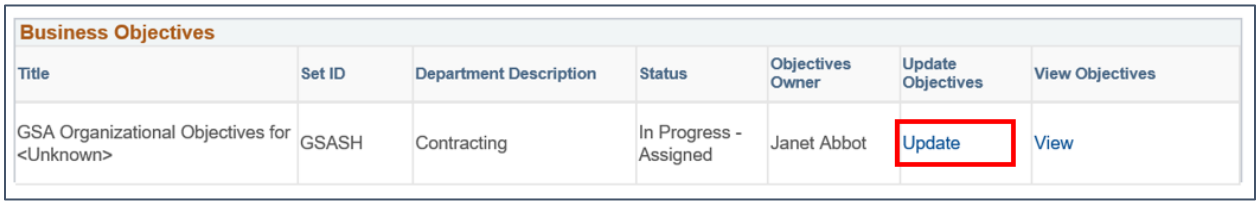
1 Select GSA Organizational Objectives from the *Objective Plan* table.

2 Search for the business objectives by entering the following data: Set ID, Department, Objectives Owner, Status.

3 Select Search.

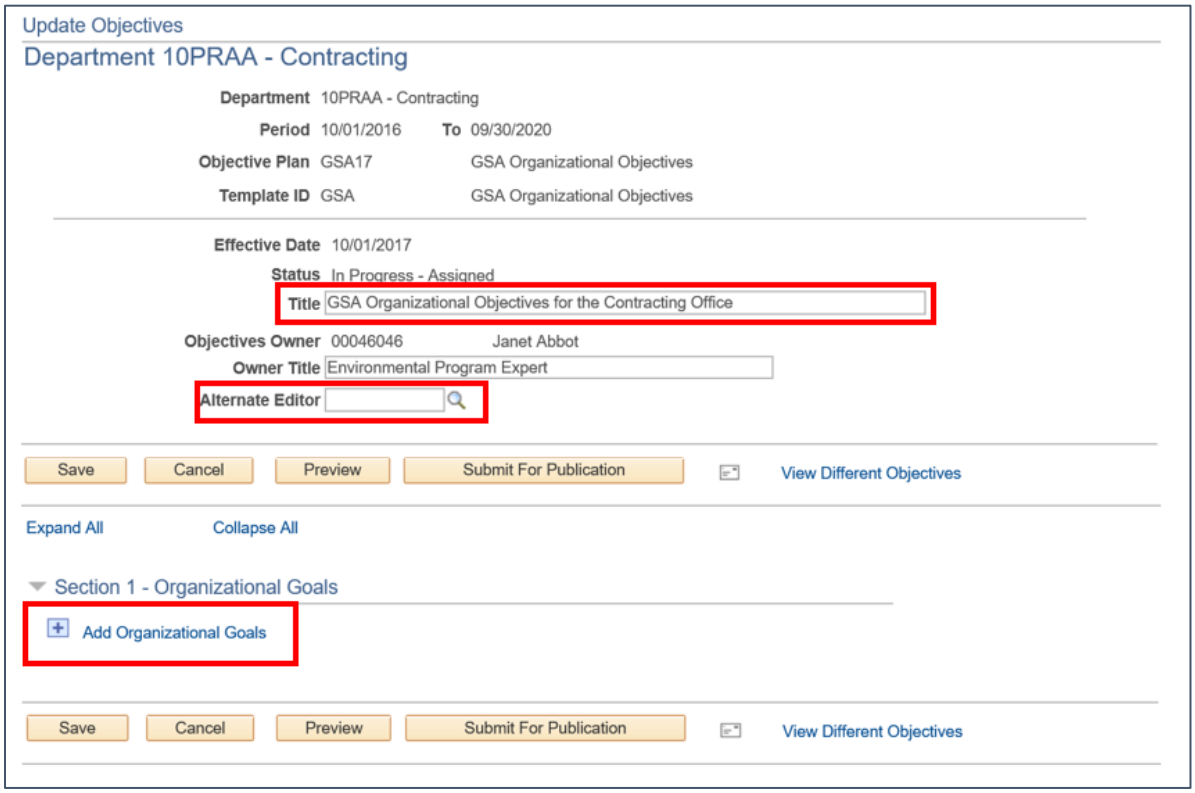


4 Select Update.



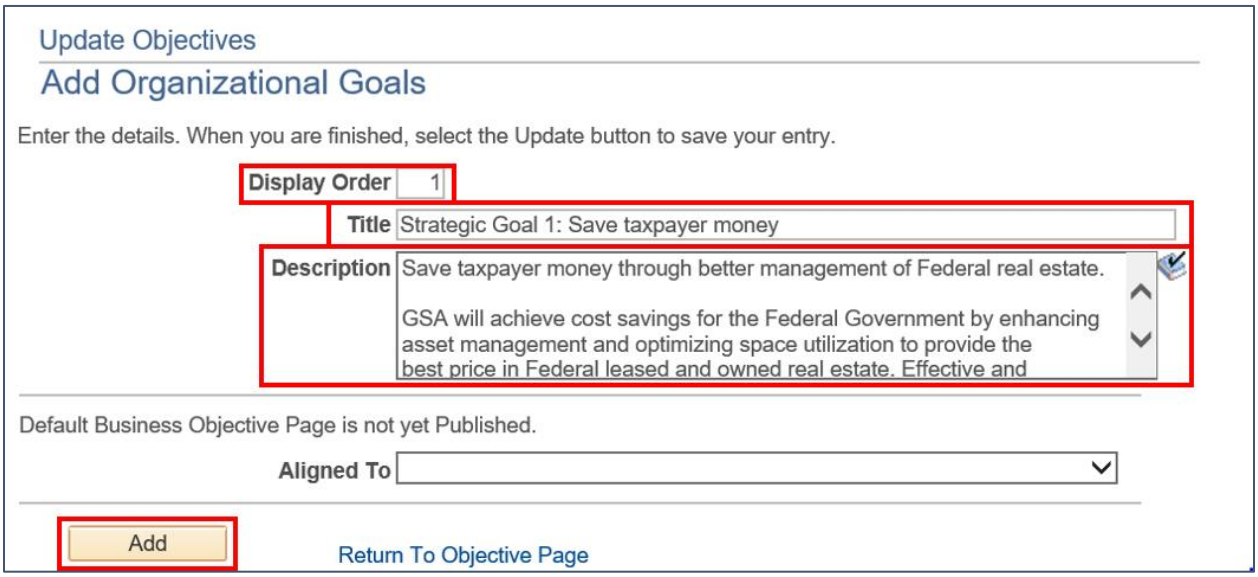
5 Modify the objective's *Title,* if applicable. Add an *Alternate Editor*, if desired.

6 Select Add Organizational Goals to begin adding organizational objectives.



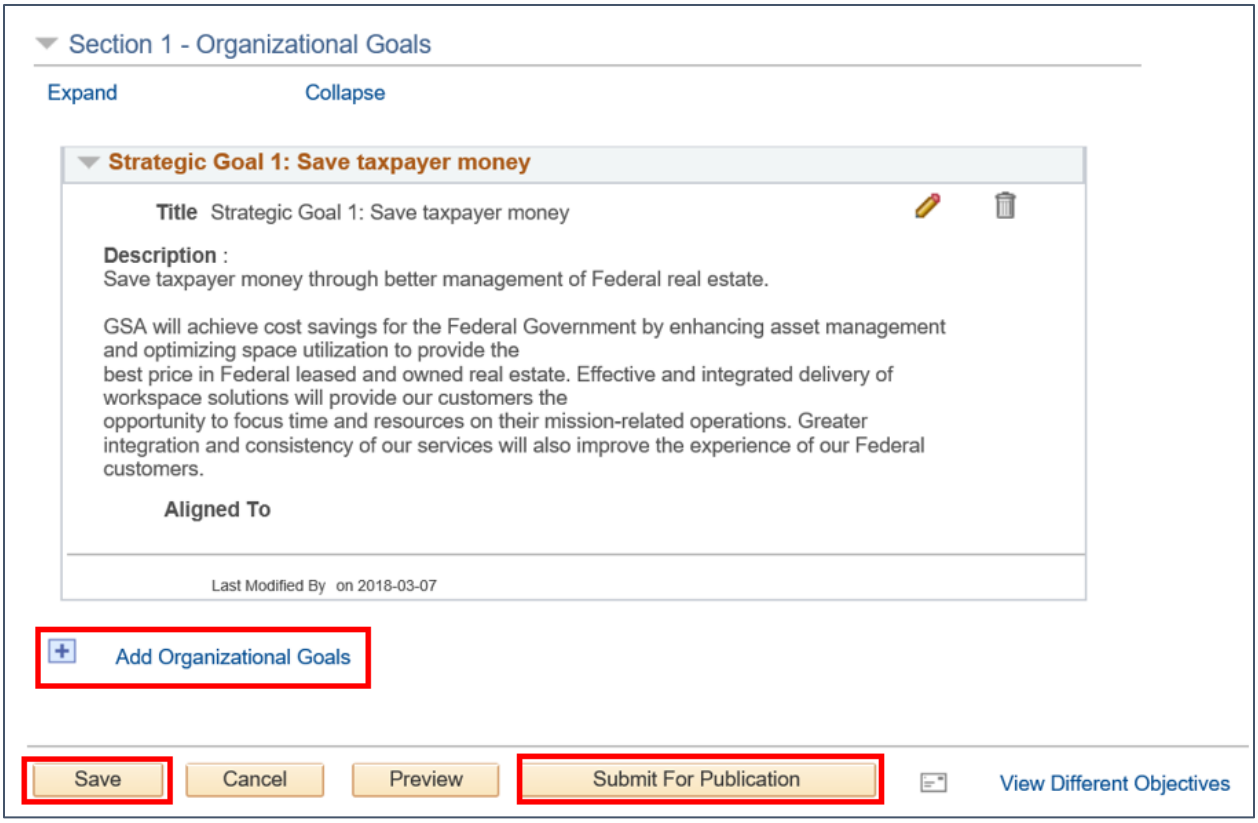
7 Enter the order you want the goal to display, the *Title* and the *Description*.

8 Select Add.



9 Continuing adding Organizational Goals following the same process until all goals have been added.

10 Select Save to return to the Objectives at a later time or select Submit for Publication to begin the process of publishing the objectives.



11 Select OK to confirm submission.

Note: Only an ePerformance Administrator can publish business objectives.

2.2.2 Publish Business Objectives

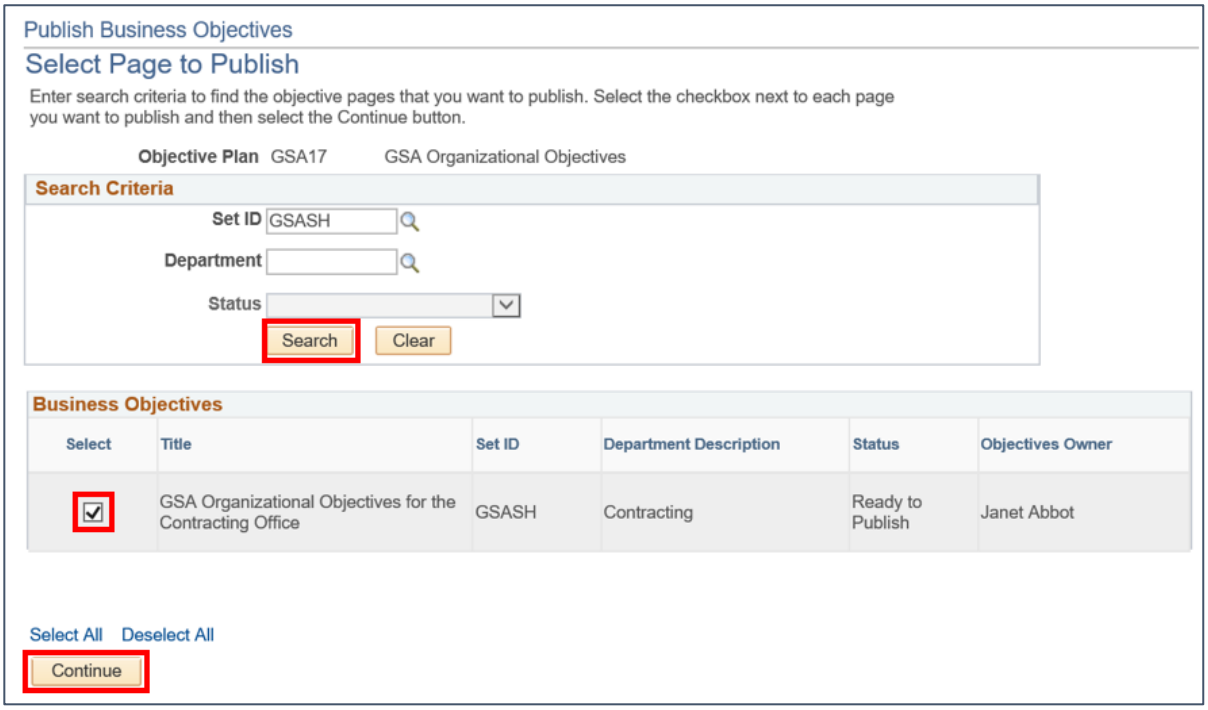
Navigation: Main Menu > Workforce Development > Performance Management > Business Objectives > Publish Business Objectives.

1 Select GSA Organizational Objectives from the *Objective Plan* table on the *Select Objective Plan* page.

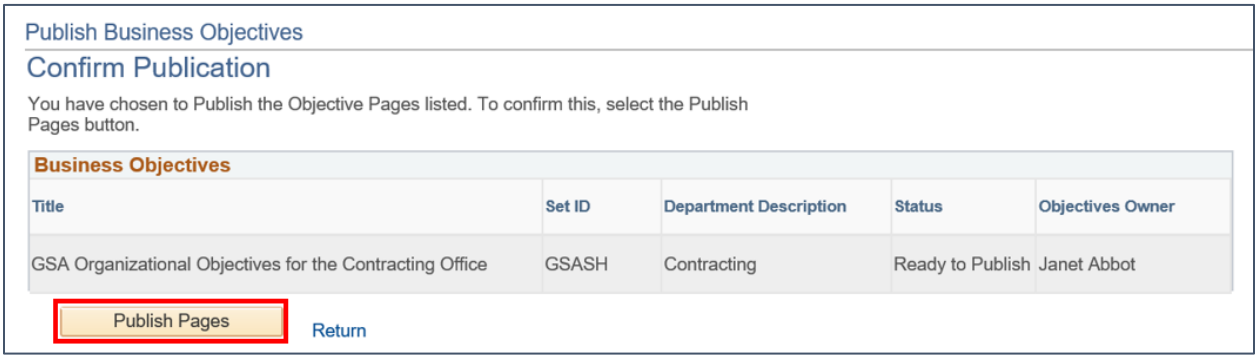
2 Select Search to view all objectives that are ready for publication.

3 Select the checkbox next to the objectives you are ready to publish.

4 Select Continue.



5 Select Publish Pages to confirm publication of the listed objectives.



6 Select OK.