



# 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

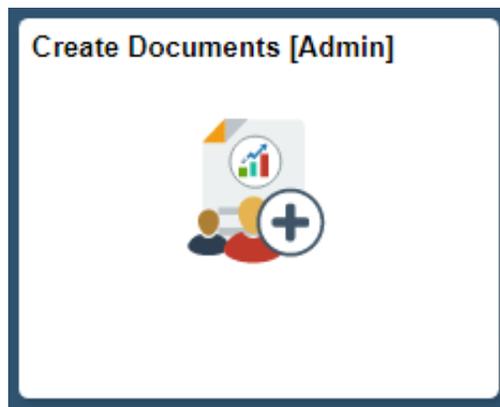
## Section 1: HR Administrative Tasks

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

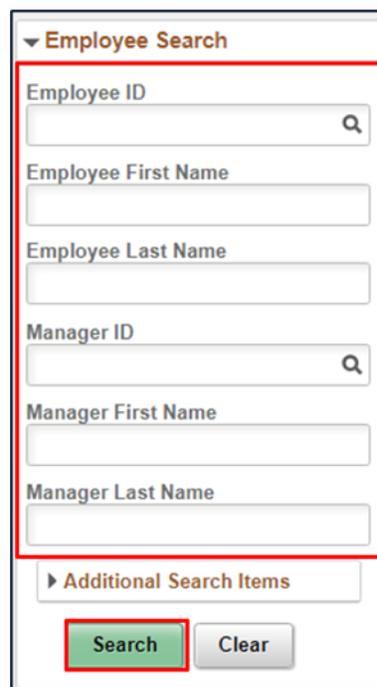
### Topic 1.1: Create New Documents

#### 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.

A form titled "Employee Search" with a dropdown arrow on the left. It contains several input fields: "Employee ID" (with a search icon), "Employee First Name", "Employee Last Name", "Manager ID" (with a search icon), "Manager First Name", and "Manager Last Name". Below these fields is a section titled "Additional Search Items" with a right-pointing arrow. At the bottom are two buttons: "Search" (highlighted with a red box) and "Clear".

- 4 Select the employee from the search results.
- 5 Select Create Documents.

**Administer Create Documents**

**Employee Search** Create Documents

Enter Search Criteria. Choose employees from the list and then Click Create Documents to continue.

1 row

Details Last Document

Name / Job Title	Supervisor	Department	Position / Occ Series	Bargaining Unit	Pay Plan / Grade
Jason Smith Interdisciplinary 101190	Jeffrey Maciejewski	WPIC Lease Projects Division	90008272 0801	1213	GS 14

Employee Search fields: Employee ID (00008322), Employee First Name, Employee Last Name, Manager ID, Manager First Name, Manager Last Name, Additional Search Items, Search, Clear.

- 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.

**Create Documents** Create

Back

Period Begin Date: 10/01/2018

Period End Date: 09/30/2019

Document Type: Performance Document

Clone from Prior Document:  No

Template: GSA Annual Performance Plan

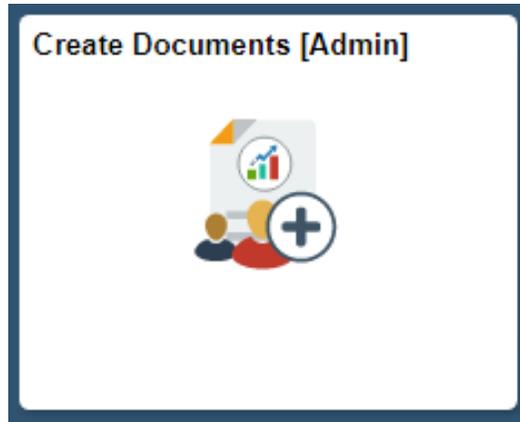
**Selected Employees**

Name	Job Title
Jason Smith	Interdisciplinary

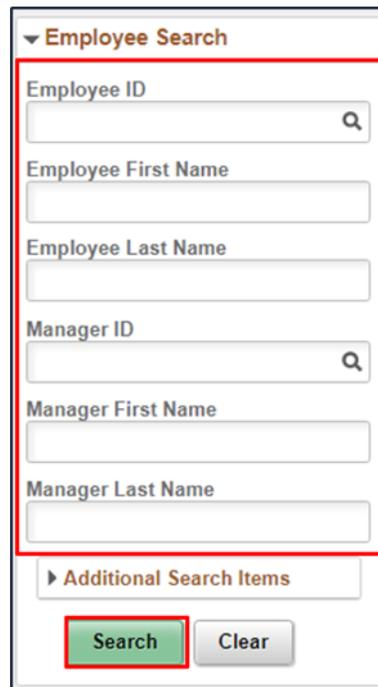
- 11 The document will appear in the employee's *Current Documents*.

### 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.

A form titled "Employee Search" with a dropdown arrow on the left. The form contains several input fields: "Employee ID" (with a search icon), "Employee First Name", "Employee Last Name", "Manager ID" (with a search icon), "Manager First Name", and "Manager Last Name". Below these fields is a section labeled "Additional Search Items" with a right-pointing arrow. At the bottom of the form are two buttons: a green "Search" button and a grey "Clear" button. A red rectangular box highlights the "Search" button.

- 4 Select the employees from the list of search results.
- 5 Select Create Documents.

**Employee Search** Create Documents

Enter Search Criteria. Choose employees from the list and then Click Create Documents to continue.

Employee ID: 00008322

Employee First Name: \_\_\_\_\_

Employee Last Name: \_\_\_\_\_

Manager ID: \_\_\_\_\_

Manager First Name: \_\_\_\_\_

Manager Last Name: \_\_\_\_\_

Additional Search Items: \_\_\_\_\_

Search Clear

Name / Job Title	Supervisor	Department	Position / Occ Series	Bargaining Unit	Pay Plan / Grade
Jason Smith Interdisciplinary 101190	Jeffrey Maciejewski	WPIC Lease Projects Division	90008272 0801	1213	GS 14

- 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.

**Create Documents** Create

Back

Period Begin Date: 10/01/2018

Period End Date: 09/30/2019

Document Type: Performance Document

Clone from Prior Document: Yes

Prior Document: Amy Jensen

10/01/2016 09/30/2017 Mass Rating Preview

**Selected Employees**

Name	Job Title
Jason Smith	Interdisciplinary

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

## Topic 1.2: Modify Dates

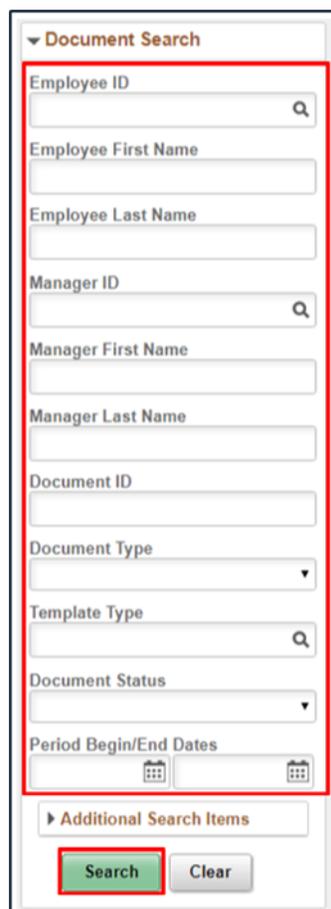
### 1.2.1 Modify Issue Date of Performance Document

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.

A screenshot of a web application's search interface. The form is titled "Document Search" and contains several input fields: "Employee ID", "Employee First Name", "Employee Last Name", "Manager ID", "Manager First Name", "Manager Last Name", "Document ID", "Document Type" (a dropdown menu), "Template Type", "Document Status" (a dropdown menu), and "Period Begin/End Dates" (two date pickers). A red rectangular box highlights the "Employee ID" field and the "Search" button at the bottom of the form. The "Search" button is green with white text, and the "Clear" button is grey with white text.

- 4 Select the performance document you wish to modify.

**Performance Documents**

To manage a performance document, enter the search criteria and select the document from the resulting list. 4 rows

Document Details | Organization Details

Name / Job Title	Manager Name	Document Type	Document Status	Period Begin / Period End	Next Due Date
Mary Bradley Building Manager	Barbara Roach	Document ID 42492 Performance Document GSA	Evaluation in Progress 	10/02/2018 09/30/2019	11/14/2019 >
Mary Bradley Building Manager	Barbara Roach	Document ID 35917 Performance Document GSA	Canceled 	10/01/2018 09/30/2019	>
Mary Bradley Building Manager	Barbara Roach	Document ID 27606 Performance Document GSA	Completed 	10/01/2017 09/30/2018	>
Mary Bradley INTERSYSTEM MOVEMENT	Barbara Roach	Document ID 11520 Performance Document MASSRATE	Completed 	10/01/2016 09/30/2017	>

- 5 Select the Related Actions arrow next to *Establish Performance Plan*.
- 6 Select Modify Issue Date.

**Performance Document** GSA

Employee 00016356 Mary Bradley Details >

Document ID 42492

Manager ID 00016475 Barbara Roach >

Period 10/02/2018 to 09/30/2019 >

Document Status Evaluation in Progress >

Approval Status Not Submitted

**Step**

Step	Due Date	Signatures
Establish Performance Plan <span style="border: 1px solid red; padding: 2px;">Modify Issue Date</span> Issue Date: 12/20/2018	11/14/2018	Mgr: Barbara Roach 12/20/2018 16:26:23 EE: Mary Bradley 12/20/2018 16:38:21 [ACKN]
Complete Mid-Year Progress Review	05/31/2019	Mgr: Barbara Roach 04/26/2019 12:42:13 EE: Mary Bradley 04/26/2019 13:51:45
Nominate Participants	11/14/2019	

- 7 Use the drop-down to select a New Plan Issue Date.
- 8 Enter comments in the Comment field.
- 9 Select Save.

**Issue Date**

Cancel Save

Select a **New Issue Date** and click **Save** to update the issue date of performance plan for this document. This date will be used to enforce the 120 day limit for issuing a Rating of Record.

Plan Issue Date 12/20/2018

New Plan Issue Date

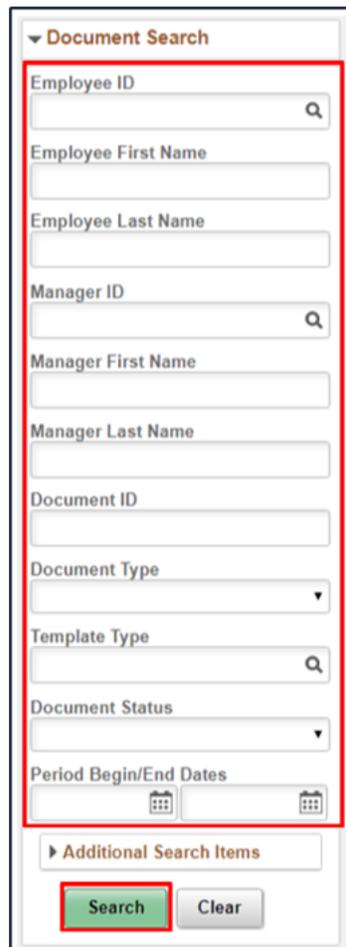
Comment

## 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.

A vertical search form titled "Document Search" with a dropdown arrow. The form contains several input fields: "Employee ID" (with a search icon), "Employee First Name", "Employee Last Name", "Manager ID" (with a search icon), "Manager First Name", "Manager Last Name", "Document ID", "Document Type" (dropdown), "Template Type" (with a search icon), "Document Status" (dropdown), and "Period Begin/End Dates" (with calendar icons). Below these fields is a section labeled "Additional Search Items" with a right-pointing arrow. At the bottom, there are two buttons: a green "Search" button and a grey "Clear" button. A red rectangular box highlights the entire search form area.

- 4 Select the performance document you wish to modify.

**Performance Documents**

To manage a performance document, enter the search criteria and select the document from the resulting list. 4 rows

[Filter] [Sort]

Document Details | Organization Details

Name / Job Title	Manager Name	Document Type	Document Status	Period Begin / Period End	Next Due Date
Mary Bradley Building Manager	Barbara Roach	Document ID 42492 Performance Document GSA	Evaluation in Progress 	10/02/2018 09/30/2019	11/14/2019 >
Mary Bradley Building Manager	Barbara Roach	Document ID 35917 Performance Document GSA	Canceled 	10/01/2018 09/30/2019	>
Mary Bradley Building Manager	Barbara Roach	Document ID 27606 Performance Document GSA	Completed 	10/01/2017 09/30/2018	>
Mary Bradley INTERSYSTEM MOVEMENT	Barbara Roach	Document ID 11520 Performance Document MASSRATE	Completed 	10/01/2016 09/30/2017	>

5 Select the Period tab.

**Performance Document** ×

**Performance Document** GSA  Open

Employee 00016356 Mary Bradley [Details >](#)

Document ID 42492

---

Manager ID 00016475 Barbara Roach >

Period 10/02/2018 to 09/30/2019 >

Document Status Evaluation in Progress >

Approval Status Not Submitted

- 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

Calendar ID GSA '18-'19

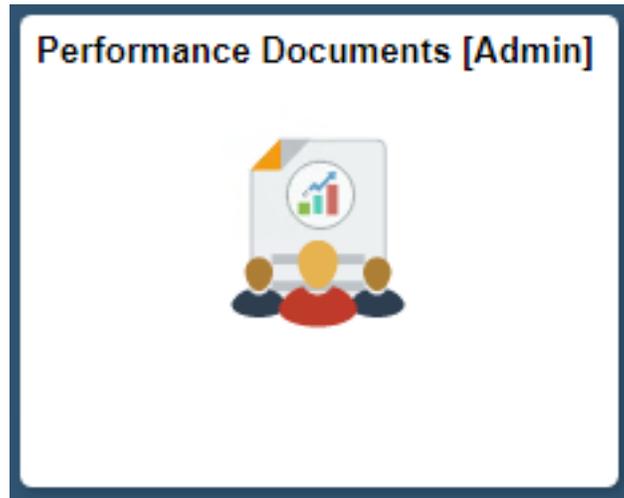
New Calendar Period

Comment

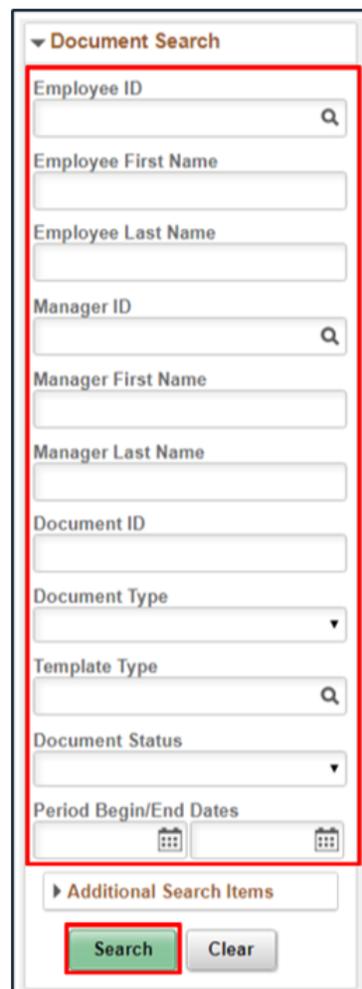
## Topic 1.3: Change Document Reviewers

### 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.

A vertical search form titled "Document Search" with a dropdown arrow on the left. The form contains several input fields: "Employee ID" (with a search icon), "Employee First Name", "Employee Last Name", "Manager ID" (with a search icon), "Manager First Name", "Manager Last Name", "Document ID", "Document Type" (dropdown), "Template Type" (with a search icon), "Document Status" (dropdown), and "Period Begin/End Dates" (with calendar icons). Below these fields is a section titled "Additional Search Items" with a right-pointing arrow. At the bottom of the form are two buttons: "Search" (highlighted with a red box) and "Clear".

4 Select the employee's performance document.

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

**Performance Documents**

To manage a performance document, enter the search criteria and select the document from the resulting list. 50 rows

Document Details | Organization Details

Name / Job Title	Manager Name	Document Type	Document Status	Period Begin / Period End	Next Due Date
<b>Andrew Low</b> IT Specialist	Jeffrey Smith	Document ID 37218 Performance Document GSA	Approval - Approved 	10/01/2018 09/30/2019	11/14/2019 >
<b>Beth MacRae</b> Organizational Development Spe	Daniel Schilly	Document ID 36220 Performance Document GSA	Approval - Approved 	10/01/2018 03/16/2019	11/14/2019 >
<b>Brad Demers</b> Procurement Analyst	Alexandra Rouse	Document ID 38363 Performance Document GSA	Approval - Submitted 	10/01/2018 09/30/2019	11/14/2019 >

5 Select the Manager ID tab.

**Performance Document** X

**Performance Document** GSA Open

Employee 00007613 Brad Demers Details >

Document ID 38363

---

Manager ID 00006666 Alexandra Rouse > Period 10/01/2018 to 09/30/2019 >

Document Status Approval > Approval Status Submitted >

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.

**Transfer Document**

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   Thomas Morgan

Comment

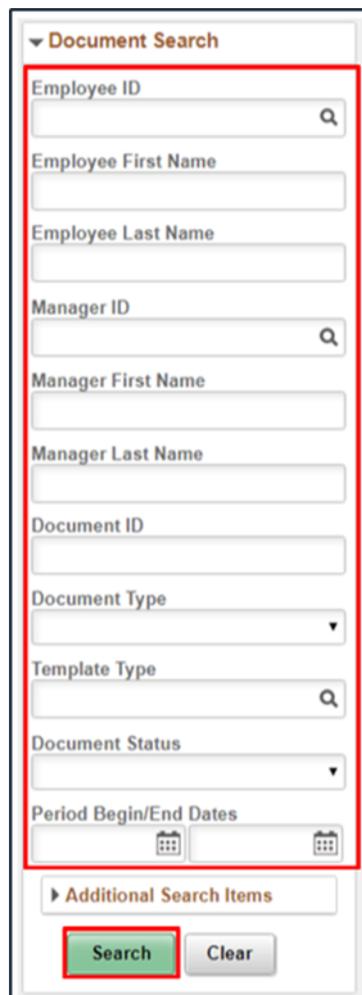
### 1.3.2 Change Document Approver

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.

A vertical search form titled "Document Search" with a dropdown arrow. The form contains several input fields: "Employee ID" (with a search icon), "Employee First Name", "Employee Last Name", "Manager ID" (with a search icon), "Manager First Name", "Manager Last Name", "Document ID", "Document Type" (dropdown), "Template Type" (with a search icon), "Document Status" (dropdown), and "Period Begin/End Dates" (with calendar icons). A red rectangular box highlights the "Employee ID" through "Period Begin/End Dates" fields. Below these fields is a section titled "Additional Search Items" with a right-pointing arrow. At the bottom of the form are two buttons: a green "Search" button and a grey "Clear" button. The "Search" button is also highlighted with a red rectangular box.

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

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

**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 <small>Issue Date: 02/27/2019</small>	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 <small>Skipped</small>	05/31/2019	
Nominate Participants	11/14/2019	
Review Employee Self-Assessment	11/14/2019	
Review Manager Evaluation <small>Pending Approval</small>	11/14/2019	

**Admin Actions Audit**

- 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.

**Approval Status**

Cancel Save

▼ Review Employee Pending

Pending

David A Shive  
SSC Position Management >

Select an **Approver** and then select a new **Reassign To** and click **Save** to reassign the reviewer of this document.

Approver

Reassign To

Comment

▶ **Administrative Overrides**

- 8 Enter search criteria to find the new approver.
- 9 Select the new approver from the search results.

**Lookup**

Cancel

Search for: Reassign To [Show Operators](#)

▼ Search Criteria

User ID (begins with)

Description (begins with)

▼ Search Results Only the first 300 results can be displayed.

300 rows

User ID	Description
00013335	
00023316	Ryan Michael Reynolds
00023367	Amanda P Hueston
00023400	Timothy Andrew Castillo
00023454	Heather Michelle Bushouse
00023518	Kiara S White

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.

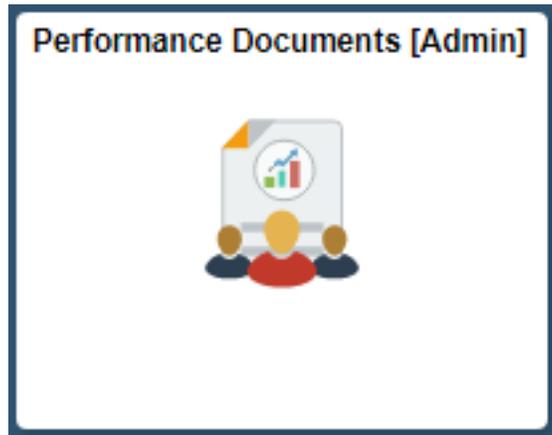
11 Select Save.

The screenshot shows a web form titled "Approval Status". At the top left is a "Cancel" button, and at the top right is a "Save" button. Below the title is a section for "Review Employee" with a "Pending" status. A card below this shows a sandglass icon, the word "Pending", and the name "David A Shive" with the position "SSC Position Management" and a right-pointing arrow. Below the card is a text instruction: "Select an Approver and then select a new Reassign To and click Save to reassign the reviewer of this document." There are three input fields: "Approver" is a dropdown menu with "David A Shive" selected; "Reassign To" is a search field with "00023518" entered and "Kiara S White" displayed; "Comment" is a text area containing "Training Comment". At the bottom is a section titled "Administrative Overrides".

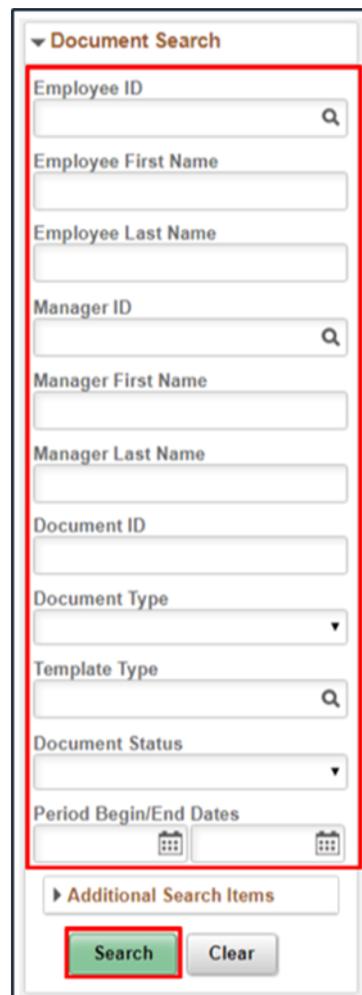
## Topic 1.4: Change Document Status or Reopen a Document

### 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.

A vertical search form titled "Document Search" with a dropdown arrow on the left. The form contains several input fields: "Employee ID" (with a search icon), "Employee First Name", "Employee Last Name", "Manager ID" (with a search icon), "Manager First Name", "Manager Last Name", "Document ID", "Document Type" (dropdown), "Template Type" (with a search icon), "Document Status" (dropdown), and "Period Begin/End Dates" (with calendar icons). Below these fields is a section titled "Additional Search Items" with a right-pointing arrow. At the bottom of the form are two buttons: a green "Search" button and a grey "Clear" button. A red rectangular box highlights the "Employee ID", "Employee First Name", "Employee Last Name", "Manager ID", "Manager First Name", "Manager Last Name", "Document ID", "Document Type", "Template Type", "Document Status", "Period Begin/End Dates", and the "Search" button.

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

**Performance Documents**

To manage a performance document, enter the search criteria and select the document from the resulting list.

96 rows

Document Details | Organization Details

Name / Job Title	Manager Name	Document Type	Document Status	Period Begin / Period End	Next Due Date
<b>Akeemah Smith</b> Realty Specialist (Lease Contr	Frank Di Dio	Document ID 58903 Performance Document GSA	Evaluation in Progress 	10/01/2018 09/30/2019	11/14/2019
<b>Alex Smith</b> IT Specialist (INFOSEC)	Carlo Costino	Document ID 60425 Performance Document GSA	Evaluation in Progress 	05/01/2019 09/30/2019	11/14/2019
<b>Alex Smith Fraboni</b> Project Manager	Aaron Wilson	Document ID 35857 Performance Document GSA	Evaluation in Progress 	10/01/2018 09/30/2019	11/14/2019

5 Select the Document Status tab.

**Performance Document**

**Performance Document** GSA Open

Employee 00012488 Akeemah Smith [Details >](#)

Document ID 58903

---

Manager ID 00017260 Frank Di Dio [>](#)      Period 10/01/2018 to 09/30/2019 [>](#)

**Document Status** Evaluation in Progress [>](#)      Approval Status Not Submitted

Step	Due Date	Signatures
<input checked="" type="checkbox"/> Establish Performance Plan <small>Issue Date: 03/21/2019</small>	11/14/2018	Mgr: Frank Di Dio 03/21/2019 15:53:44 EE: Akeemah Smith 04/02/2019 14:34:23 [ACKN]
<input checked="" type="checkbox"/> Complete Mid-Year Progress Review	05/31/2019	Mgr: Frank Di Dio 05/29/2019 14:58:15 EE: Akeemah Smith 05/30/2019 11:09:43
<input type="checkbox"/> Nominate Participants	11/14/2019	
<input type="checkbox"/> Review Employee Self-Assessment	11/14/2019	
<input type="checkbox"/> Review Manager Evaluation	11/14/2019	

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

**Document Status**

Cancel Save

Select a **Document Status** and click **Save** to update the status of this document.

Document Status Evaluation in Progress

New Document Status

Comment

- Cancel Document
- Complete Mid-Year Progress Review
- Establish Performance Plan

- 7 Enter a comment in the Comment field.
- 8 Select Save.

**Document Status**

Cancel Save

Select a **Document Status** and click **Save** to update the status of this document.

Document Status Evaluation in Progress

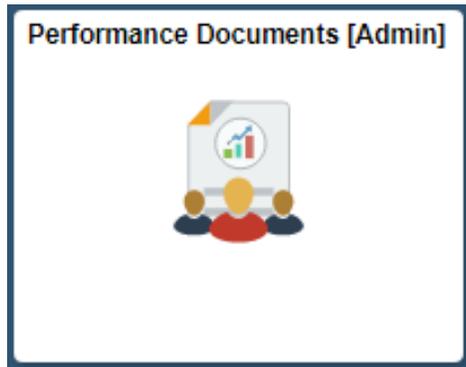
New Document Status

Comment

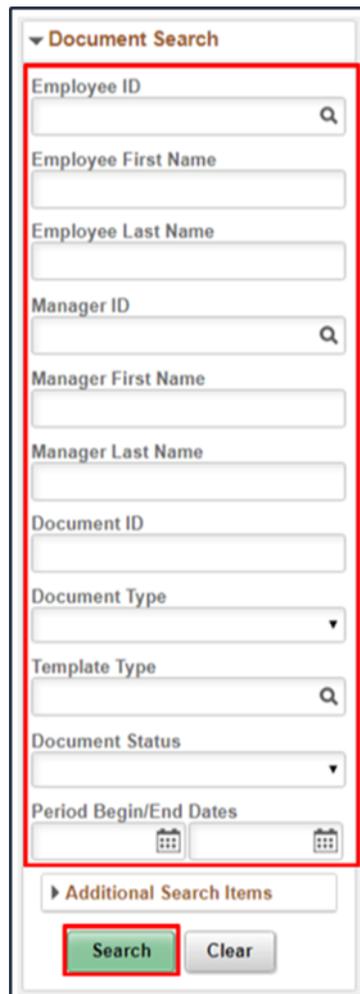
## 1.4.2 Reopen Employee Self-Assessment

Roles: Administrator, Support

- 1 Select the Performance Documents [Admin] tile.



- 2 Enter search criteria to find the correct employee.
- 3 Select Search.

A vertical form titled "Document Search" with a dropdown arrow on the left. The form contains several input fields: "Employee ID" (with a search icon), "Employee First Name", "Employee Last Name", "Manager ID" (with a search icon), "Manager First Name", "Manager Last Name", "Document ID", "Document Type" (with a dropdown arrow), "Template Type" (with a search icon), "Document Status" (with a dropdown arrow), and "Period Begin/End Dates" (with calendar icons). Below these fields is a section titled "Additional Search Items" with a right-pointing arrow. At the bottom of the form are two buttons: "Search" (highlighted with a red box) and "Clear".

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

<b>Jason Smith</b> Interdisciplinary	Jeffrey Maciejewski	Document ID 33847 Performance Document GSA	Evaluation in Progress 	10/01/2018 09/30/2019	11/14/2019	>
<b>Jeffrey Smith</b> Telecommunications Manager	William Lewis	Document ID 38306 Performance Document GSA	Evaluation in Progress 	10/01/2018 09/30/2019	11/14/2019	>
<b>Jeffrey Smith</b> Realty Services Manager	David Nicholas	Document ID 41485 Performance Document GSA	Evaluation in Progress 	10/01/2018 09/30/2019	11/14/2019	>

- Select the Related Actions link.
- Select Reopen Step.

Performance Document
Open

**Performance Document** GSA

Employee 00008322 Jason Smith Details >

Document ID 33847

Manager ID 00016519 Jeffrey Maciejewski >

Period 10/01/2018 to 09/30/2019 >

Document Status Evaluation in Progress >

Approval Status Not Submitted

Step	Due Date	Signatures
<input checked="" type="checkbox"/> Establish Performance Plan Issue Date: 02/10/2019	11/14/2018	Mgr: Jeffrey Maciejewski 07/25/2019 14:02:39 EE: Jason Smith 07/25/2019 14:03:14 [DISA]
<input checked="" type="checkbox"/> Complete Mid-Year Progress Review	11/14/2019	Mgr: Jeffrey Maciejewski 07/25/2019 14:05:22 EE: Jeffrey Maciejewski 07/24/2019 09:33:32 [OVRD]
<input type="checkbox"/> Nominate Participants	11/14/2019	
<input checked="" type="checkbox"/> Review Employee Self-Assessment	11/14/2019	EE: Jason Smith 07/25/2019 14:45:48
<input checked="" type="checkbox"/> Review Manager Evaluation	11/14/2019	

Admin Actions Audit

- Select OK.

**Confirm Reopen Step**

You have chosen to reopen the Employee step for Jason Smith.  
Select OK to have the document status set back to In Progress.

OK
Cancel

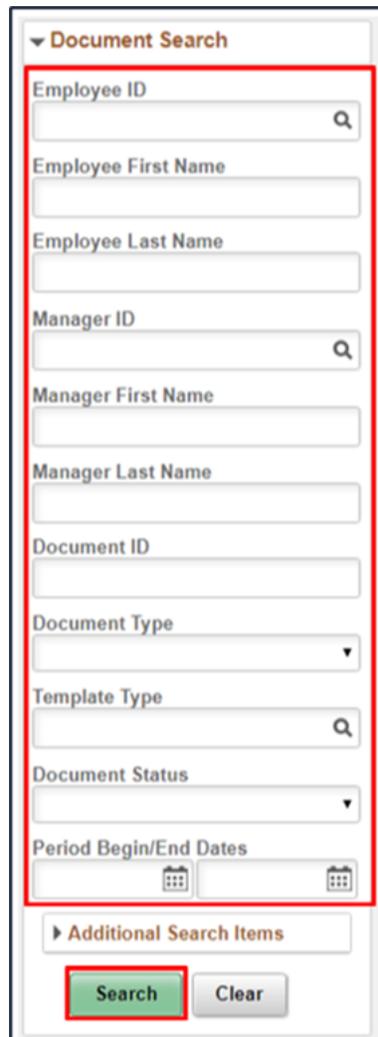
### 1.4.3 Reopen Mid-Year Review

Roles: Administrator

- 1 Select the Performance Documents [Admin] tile.



- 2 Enter search criteria to find the correct employee.
- 3 Select Search.

A screenshot of a web application's search interface. The form is titled "Document Search" and contains several input fields: "Employee ID", "Employee First Name", "Employee Last Name", "Manager ID", "Manager First Name", "Manager Last Name", "Document ID", "Document Type" (a dropdown menu), "Template Type", "Document Status" (a dropdown menu), and "Period Begin/End Dates" (two date pickers). A red rectangular box highlights the entire search form area. At the bottom of the form, there is a section labeled "Additional Search Items" and two buttons: a green "Search" button and a grey "Clear" button. The "Search" button is also highlighted with a red rectangular box.

- 4 Select the performance document you wish to reopen.

Name / Job Title	Manager Name	Document Type	Document Status	Period Begin / Period End	Next Due Date
<b>Akeemah Smith</b> Really Specialist (Lease Contr)	Frank Di Dio	Document ID: 58903 Performance Document GSA	Evaluation in Progress 	10/01/2018 09/30/2019	11/14/2019 >
<b>Alex Smith</b> IT Specialist (INFOSEC)	Carlo Costino	Document ID: 60425 Performance Document GSA	Evaluation in Progress 	05/01/2019 09/30/2019	11/14/2019 >

5 Select the Document Status tab.

**Performance Document** x

**Performance Document** GSA Open

Employee 00012488 Akeemah Smith [Details >](#)

Document ID 58903

---

Manager ID 00017260 Frank Di Dio >      Period 10/01/2018 to 09/30/2019 >

**Document Status** Evaluation in Progress >      Approval Status Not Submitted

Step	Due Date	Signatures
<input checked="" type="checkbox"/> Establish Performance Plan <small>Issue Date: 03/21/2019</small>	11/14/2018	Mgr: Frank Di Dio 03/21/2019 15:53:44 EE: Akeemah Smith 04/02/2019 14:34:23 [ACKN]
<input checked="" type="checkbox"/> Complete Mid-Year Progress Review	05/31/2019	Mgr: Frank Di Dio 05/29/2019 14:58:15 EE: Akeemah Smith 05/30/2019 11:09:43
<input type="checkbox"/> Nominate Participants	11/14/2019	
<input type="checkbox"/> Review Employee Self-Assessment	11/14/2019	
<input type="checkbox"/> Review Manager Evaluation	11/14/2019	

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

**Document Status** Save

Cancel

Select a **Document Status** and click **Save** to update the status of this document.

Document Status Evaluation in Progress

New Document Status

Comment

- Cancel Document
- Complete Mid-Year Progress Review
- Establish Performance Plan

7 Enter comments in the Comment field.

8 Select Save.

Cancel **Document Status** Save

Select a **Document Status** and click **Save** to update the status of this document.

Document Status Evaluation in Progress

New Document Status Complete Mid-Year Progress Review ▼

Comment Demo Comment

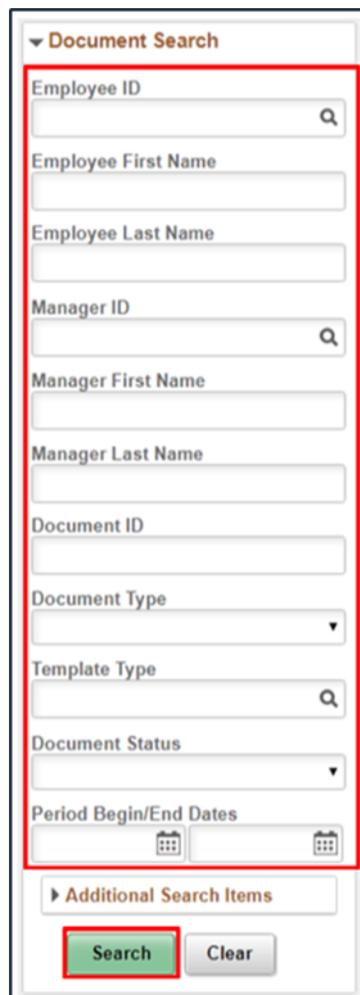
#### 1.4.4 Reopen Peer Review

Roles: Administrator, Support

- 1 Select the Performance Documents [Admin] tile.



- 2 Enter search criteria to find the correct employee.
- 3 Select Search.

A vertical search form titled "Document Search" with a dropdown arrow. The form contains several input fields: "Employee ID" (with a search icon), "Employee First Name", "Employee Last Name", "Manager ID" (with a search icon), "Manager First Name", "Manager Last Name", "Document ID", "Document Type" (dropdown), "Template Type" (with a search icon), "Document Status" (dropdown), and "Period Begin/End Dates" (with calendar icons). At the bottom, there is a section for "Additional Search Items" and two buttons: "Search" (highlighted with a red box) and "Clear".

- 4 Select the performance document you wish to modify.

**Performance Documents**

To manage a performance document, enter the search criteria and select the document from the resulting list.

4 rows

Document Details Organization Details

Name / Job Title	Manager Name	Document Type	Document Status	Period Begin / Period End	Next Due Date
Michelle Lee Human Resources Specialist (CI)	Cheryl Cato	Document ID 39380 Performance Document GSA	Canceled 	11/14/2018 09/30/2019	>
Michelle Lee Human Resources Specialist (CI)	Cheryl Cato	Document ID 40873 Performance Document GSA	Evaluation in Progress 	10/01/2018 09/30/2019	11/14/2019 >
Michelle Lee Human Resources Specialist (CI)	Cheryl Cato	Document ID 22677 Performance Document GSA	Completed 	01/22/2018 09/30/2018	>
Michelle Lee INTERSYSTEM MOVEMENT	Cheryl Cato	Document ID 14312 Performance Document MASSRATE	Completed 	05/31/2017 09/30/2017	>

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

**Performance Document** GSA

Employee 00004831 Michelle Lee [Details >](#) Open

Document ID 40873

Manager ID 00013125 Cheryl Cato > Period 10/01/2018 to 09/30/2019 >

Document Status Evaluation in Progress > Approval Status Not Submitted

Step	Due Date	Signatures
Establish Performance Plan Issue Date: 11/15/2018	11/14/2018	Mgr: Cheryl Cato 11/15/2018 15:02:24 EE: Michelle Lee 11/15/2018 15:36:52 [ACKN]
Complete Mid-Year Progress	05/31/2019	Mgr: Cheryl Cato 05/31/2019 10:29:57 EE: Michelle Lee 05/31/2019 12:35:38
Nominate Participants Jason Smith-Accepted	11/14/2019	Peer: Jason Smith 07/25/2019 15:20:20
Nominate Participants Hillary Jeffrey-Pending	11/14/2019	
Review Employee Self-Assessment	11/14/2019	EE: Michelle Lee 07/25/2019 15:10:58
Review Manager Evaluation	11/14/2019	

**Actions** x

- View Step
- Reopen Step**

- Select OK.

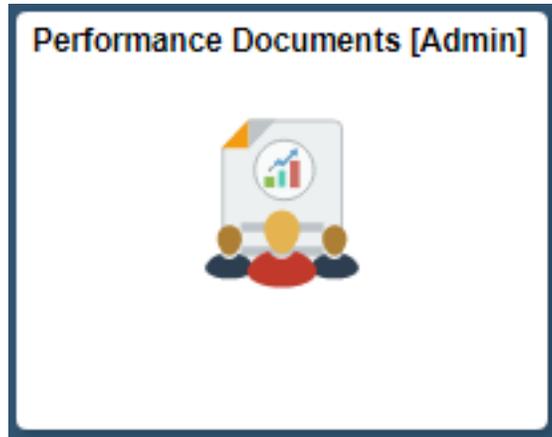
**Confirm Reopen Step**

You have chosen to reopen the Other Participant step for Jason Smith. Select OK to have the document status set back to In Progress.

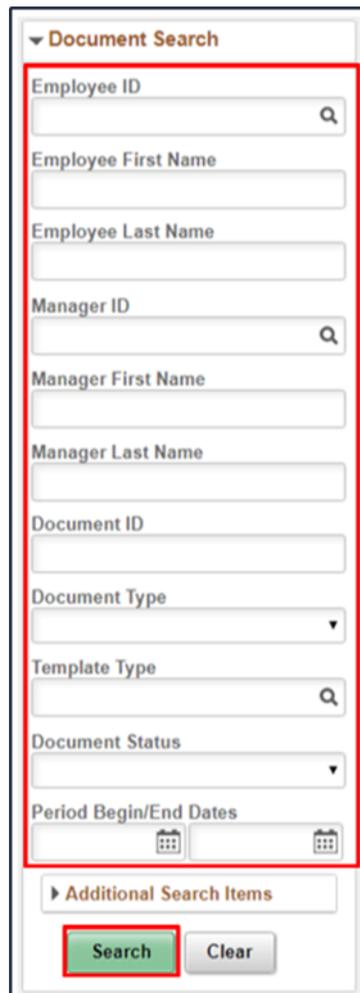
OK Cancel

#### 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.

A vertical search form titled "Document Search" with a dropdown arrow on the left. The form contains several input fields: "Employee ID" (with a search icon), "Employee First Name", "Employee Last Name", "Manager ID" (with a search icon), "Manager First Name", "Manager Last Name", "Document ID", "Document Type" (with a dropdown arrow), "Template Type" (with a search icon), "Document Status" (with a dropdown arrow), and "Period Begin/End Dates" (with two calendar icons). Below these fields is a section titled "Additional Search Items" with a right-pointing arrow. At the bottom of the form are two buttons: "Search" (highlighted with a red box) and "Clear".

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

**Performance Documents**

To manage a performance document, enter the search criteria and select the document from the resulting list.

8 rows

Document Details | Organization Details

Name / Job Title	Manager Name	Document Type	Document Status	Period Begin / Period End	Next Due Date
Beth MacRae Organizational Development Spe	Daniel Schilly	Document ID 36220 Performance Document GSA	Approval - Approved 	10/01/2018 03/16/2019	11/14/2019
Elizabeth Coleman-Busha Auditor	Elizabeth Telo	Document ID 57325 Performance Document OIG	Approval - Approved 	01/01/2019 05/25/2019	01/31/2020
Frederick Thomas Supervisory Contract Specialis	Darrick Early	Document ID 26735 Performance Document GSA	Approval - Approved 	10/01/2017 07/06/2018	11/14/2018

5 Select the Document Status tab.

**Performance Document** X

**Performance Document** GSA Open

Employee 00011235 Beth MacRae [Details >](#)

Document ID 36220

---

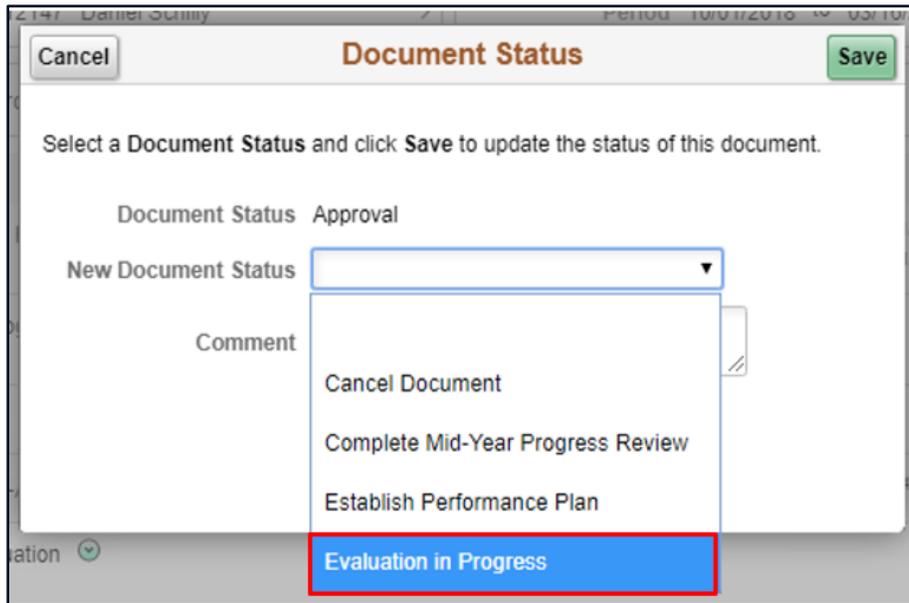
Manager ID 00012147 Daniel Schilly [>](#)      Period 10/01/2018 to 03/16/2019 [>](#)

Document Status Approval [>](#)      Approval Status Approved [>](#)

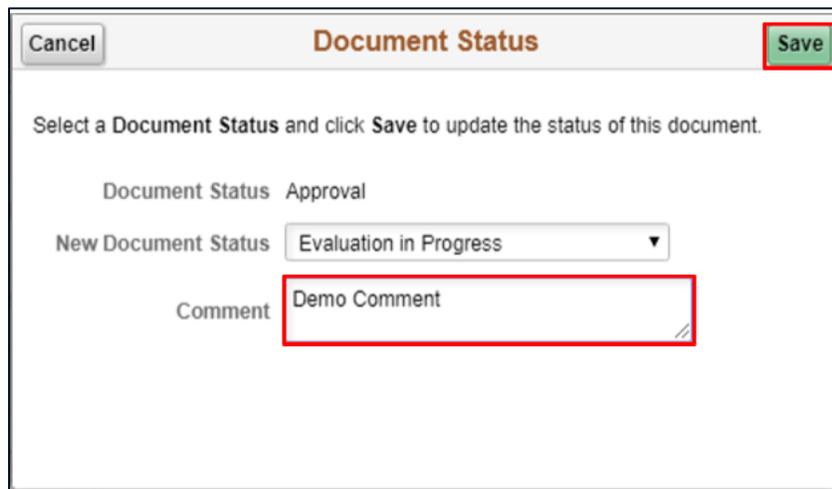
Step	Due Date	Signatures
Establish Performance Plan Issue Date: 11/12/2018	11/14/2018	Mgr: Daniel Schilly 11/12/2018 20:30:34 EE: Beth MacRae 11/13/2018 10:15:35 [ACKN]
Complete Mid-Year Progress Review Skipped	05/31/2019	
Nominate Participants	11/14/2019	
Review Employee Self-Assessment	11/14/2019	EE: Beth MacRae 04/30/2019 11:34:07
Review Manager Evaluation Approved	11/14/2019	

**Admin Actions Audit**

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



- 7 Enter comments in the Comment field.
- 8 Select Save.

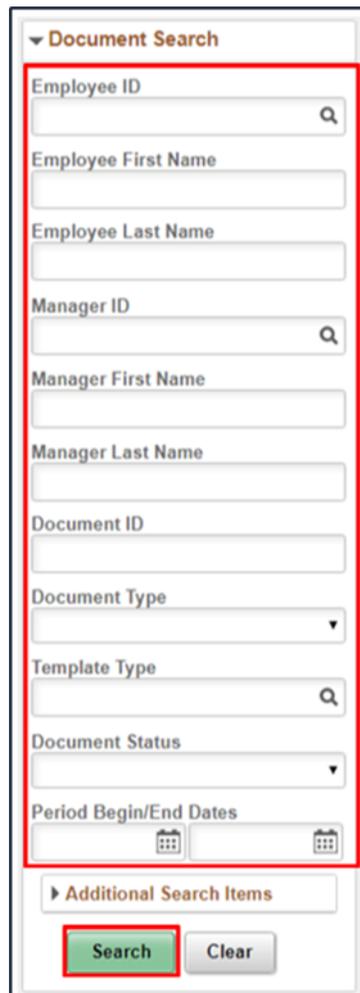


#### 1.4.6 Cancel a Document

- 1 Select the Performance Documents [Admin] tile.



- 2 Enter search criteria to find the correct employee.
- 3 Select Search.

A vertical search form titled "Document Search" with a dropdown arrow on the left. The form contains several input fields: "Employee ID" (with a search icon), "Employee First Name", "Employee Last Name", "Manager ID" (with a search icon), "Manager First Name", "Manager Last Name", "Document ID", "Document Type" (dropdown), "Template Type" (with a search icon), "Document Status" (dropdown), and "Period Begin/End Dates" (with calendar icons). Below these fields is a section titled "Additional Search Items" with a right-pointing arrow. At the bottom of the form are two buttons: "Search" (highlighted with a red box) and "Clear".

- 4 Select the performance document you wish to cancel.

Document Details		Organization Details			
Name / Job Title	Manager Name	Document Type	Document Status	Period Begin / Period End	Next Due Date
Akeemah Smith Realty Specialist (Lease Contr)	Frank Di Dio	Document ID 58903 Performance Document GSA	Evaluation in Progress 	10/01/2018 09/30/2019	11/14/2019
Alex Smith IT Specialist (INFOSEC)	Carlo Costino	Document ID 60425 Performance Document GSA	Evaluation in Progress 	05/01/2019 09/30/2019	11/14/2019

5 Select the Document Status tab.

### Performance Document

**Performance Document** GSA Open

Employee 00023291 Alex Smith [Details >](#)

Document ID 60425

---

Manager ID 00017707 Carlo Costino [>](#)      Period 05/01/2019 to 09/30/2019 [>](#)

**Document Status** Evaluation in Progress [>](#)      Approval Status Not Submitted

Step	Due Date	Signatures
<input checked="" type="checkbox"/> Establish Performance Plan <small>Issue Date: 05/20/2019</small>	11/14/2018	Mgr: Carlo Costino 05/20/2019 16:44:17 EE: Alex Smith 05/20/2019 16:55:04 [ACKN]
<input checked="" type="checkbox"/> Complete Mid-Year Progress Review	05/31/2019	Mgr: Carlo Costino 05/23/2019 11:06:53 EE: Alex Smith 05/23/2019 11:19:15
<input type="checkbox"/> Nominate Participants	11/14/2019	
<input type="checkbox"/> Review Employee Self-Assessment	11/14/2019	
<input type="checkbox"/> Review Manager Evaluation	11/14/2019	

[Admin Actions Audit](#)

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

### Document Status

Cancel Save

Select a **Document Status** and click **Save** to update the status of this document.

Document Status Evaluation in Progress

New Document Status

Comment 

Cancel Document  
 Complete Mid-Year Progress Review  
 Establish Performance Plan

7 Enter comments in the Comment field.

8 Select Save.

Cancel **Document Status** Save

Select a **Document Status** and click **Save** to update the status of this document.

Document Status Evaluation in Progress

New Document Status Cancel Document

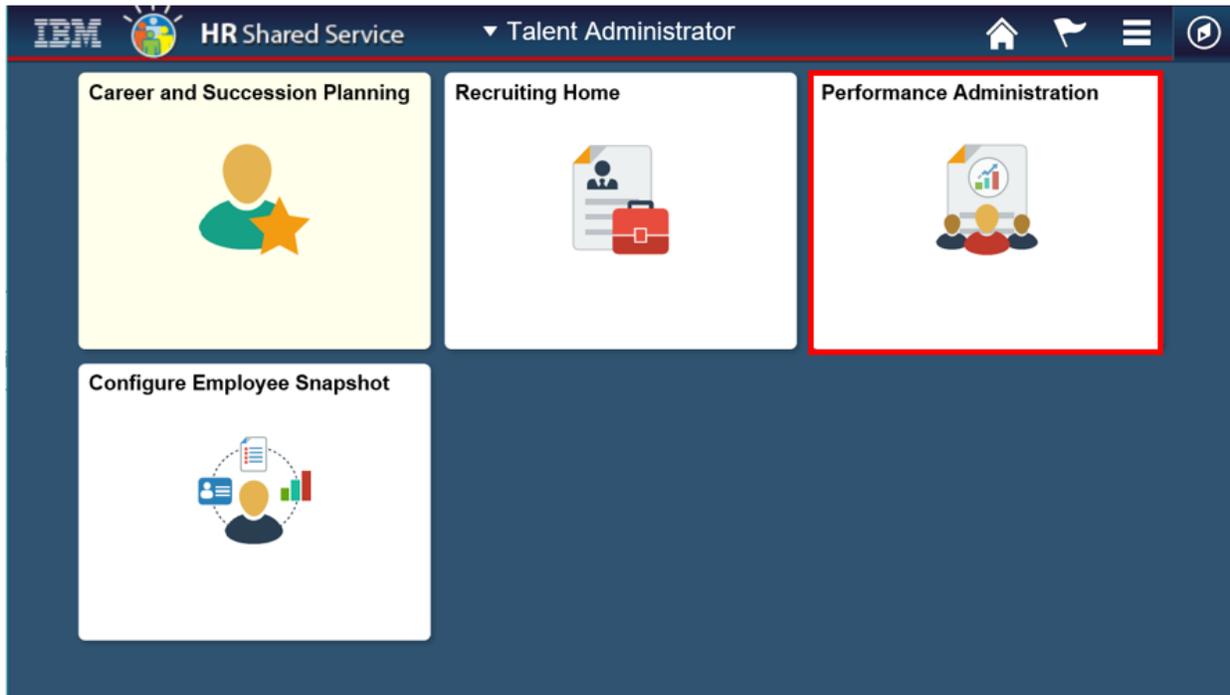
Comment Demo Comment

# Topic 1.5: Mass Actions

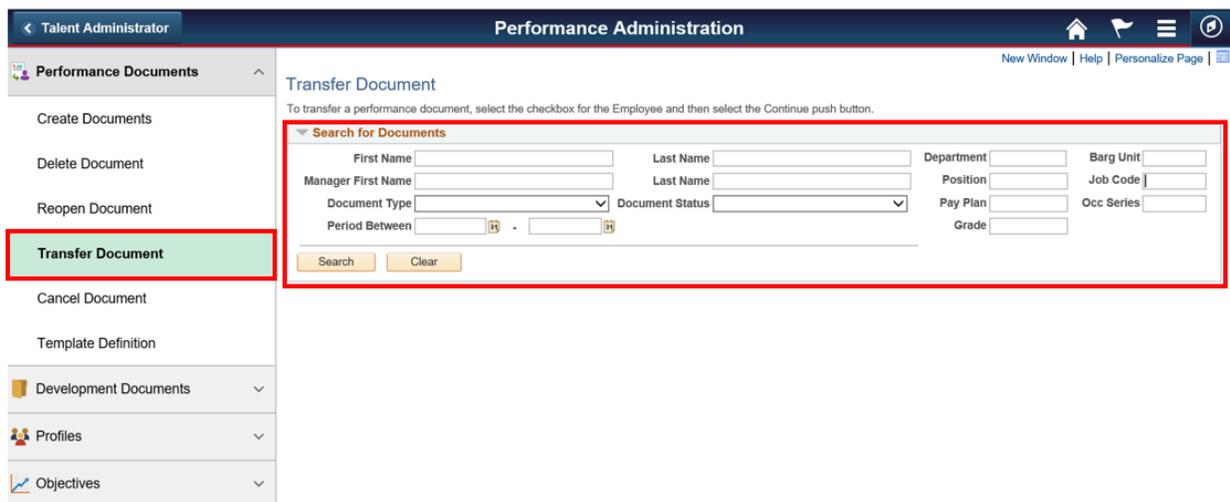
## 1.5.1 Classic Transfer Document

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.

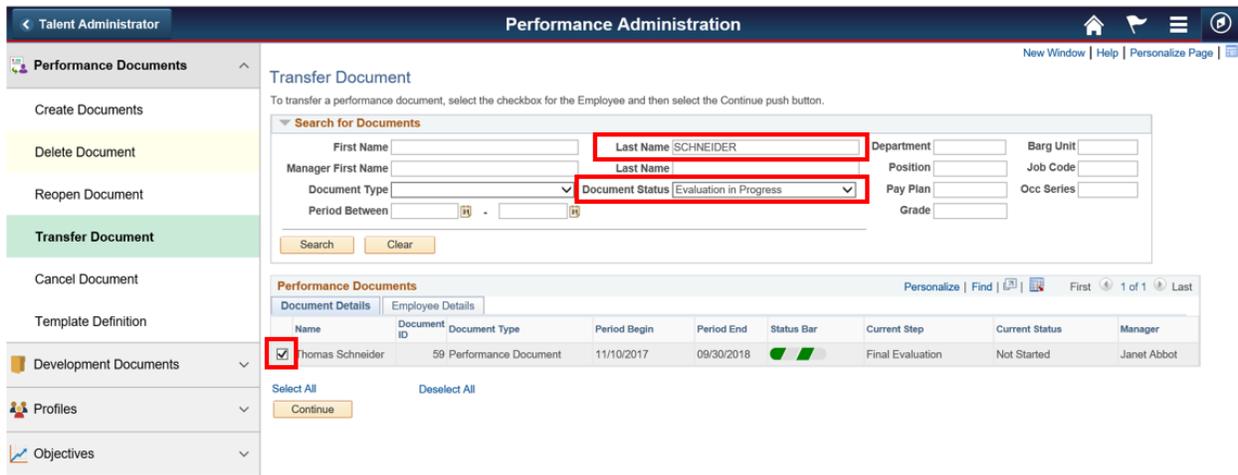


- 2 Select Transfer Documents on the left navigation menu.
- 3 Enter applicable data in the *Search for Documents* fields to locate the correct performance document.
- 4 Select Search.

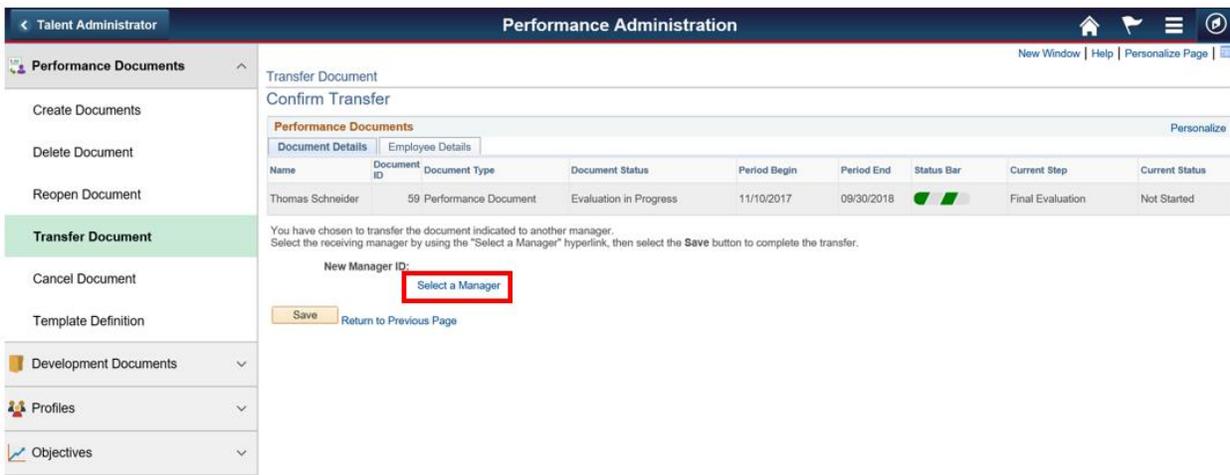


- 5 Select the correct performance document.

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.

**Person Search**

[Help](#)

**Person Search**

Search Criteria and Results

▶ **Instructions**

**Search Criteria**

Name

**Last Name** SMITH

Second Last Name

First Name

ACName

Search

**Search Results**

<input type="radio"/>	Donald Smith	<a href="#">i</a>
<input checked="" type="radio"/>	John Smith	<a href="#">i</a>
<input type="radio"/>	Regina Smith	<a href="#">i</a>
<input type="radio"/>	Sara Smith	<a href="#">i</a>
<input type="radio"/>	Sonja Smith	<a href="#">i</a>
<input type="radio"/>	Sonya Smith	<a href="#">i</a>
<input type="radio"/>	Taylor Smith	<a href="#">i</a>

OK

[Return to Previous Page](#)

11 Confirm the correct employee was selected.

12 Select Save to confirm the transfer.

Talent Administrator **Performance Administration** [New Window](#) [Help](#) [Personalize Page](#)

**Performance Documents**

Create Documents

Delete Document

Reopen Document

**Transfer Document**

Cancel Document

Template Definition

Development Documents

Profiles

Objectives

Transfer Document

Confirm Transfer

**Performance Documents** [Personalize](#)

Document Details		Employee Details						
Name	Document ID	Document Type	Document Status	Period Begin	Period End	Status Bar	Current Step	Current Status
Thomas Schneider	59	Performance Document	Evaluation in Progress	11/10/2017	09/30/2018		Final Evaluation	Not Started

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

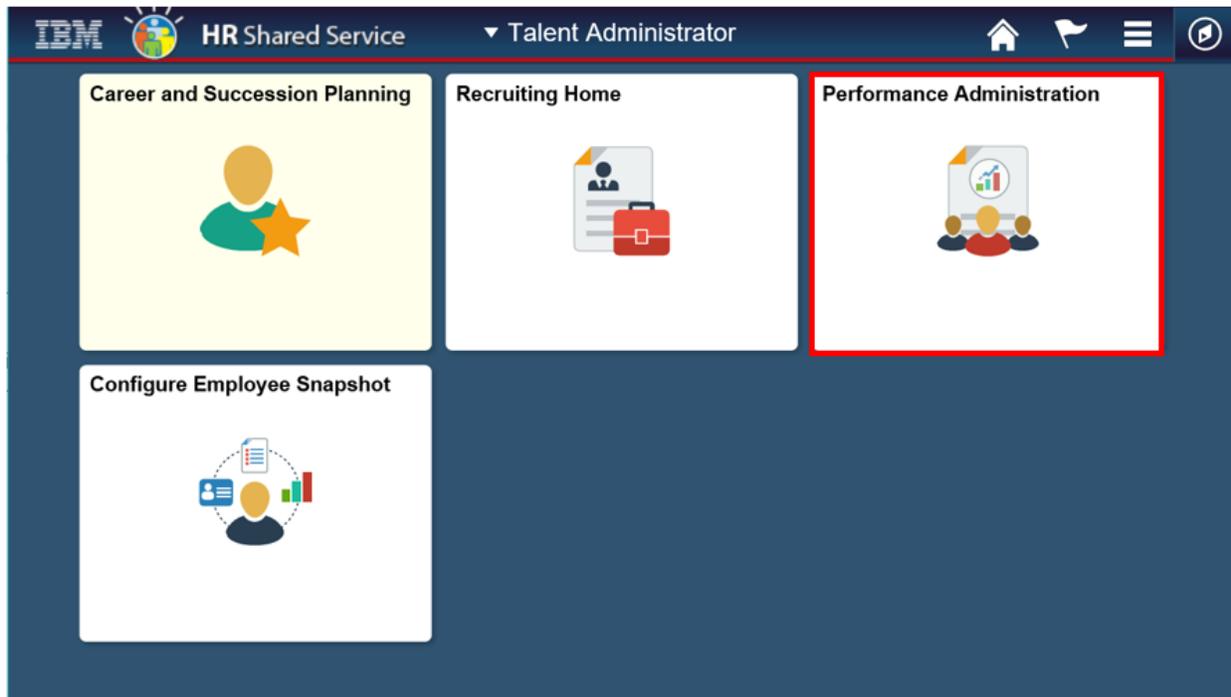
**New Manager ID:** John Smith [Select a Manager](#)

Save [Return to Previous Page](#)

## 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.

**Talent Administrator** Performance Administration New Window | Help | Personalize Page |

**Performance Documents** Reopen Document

Create Documents  
 Delete Document  
**Reopen Document**  
 Transfer Document  
 Cancel Document  
 Template Definition

Development Documents  
 Profiles  
 Objectives

To change a performance document's status back to "Evaluation", select the checkbox next to the Employee's Name and then select the Continue push button.

**Search for Documents**

First Name:  Last Name: **FENNER** Department:  Barg Unit:   
 Manager First Name:  Last Name:  Position:  Job Code:   
 Document Type:  Document Status:  Pay Plan:  Occ Series:   
 Period Between:  -  Grade:

**Performance Documents** Personalize | Find | 1 of 1 | Last

Name	Document ID	Document Type	Period Begin	Period End	Status Bar	Current Step	Current Status	Manager
<input checked="" type="checkbox"/> Jesse Fenner	72	Performance Document	10/01/2017	09/30/2018	<span style="color: green;">■</span> <span style="color: yellow;">■</span>	Final Evaluation		Thomas Schneider

Select All  Deselect All

6 Select Save to confirm reopen.

**Talent Administrator** Performance Administration New Window | Help | Personalize Page |

**Performance Documents** Reopen Document

Create Documents  
 Delete Document  
**Reopen Document**  
 Transfer Document  
 Cancel Document  
 Template Definition

Development Documents  
 Profiles  
 Objectives

**Confirm Reopen Document**

**Performance Documents** Personalize |

Name	Document ID	Document Type	Document Status	Period Begin	Period End	Status Bar	Current Step	Current Status
Jesse Fenner	72	Performance Document	Pending Acknowledgement	10/01/2017	09/30/2018	<span style="color: green;">■</span> <span style="color: yellow;">■</span>	Final Evaluation	

You have chosen to change the status of the performance document listed. The status will be changed to **In Progress**.  
 Note that changing the status of an Employee's self-evaluation will not change the status of the overall document. To change the overall document status, you must change the status of the Manager's document.

To confirm this status change, select the **Save** button.

[Return to Previous Page](#)

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.

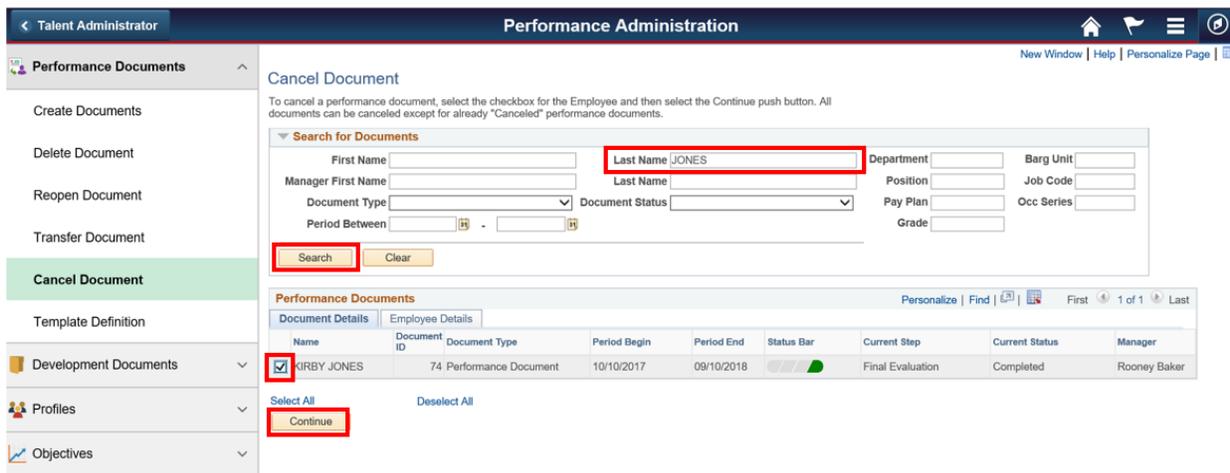
### 1.5.3 Classic Cancel Document

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.



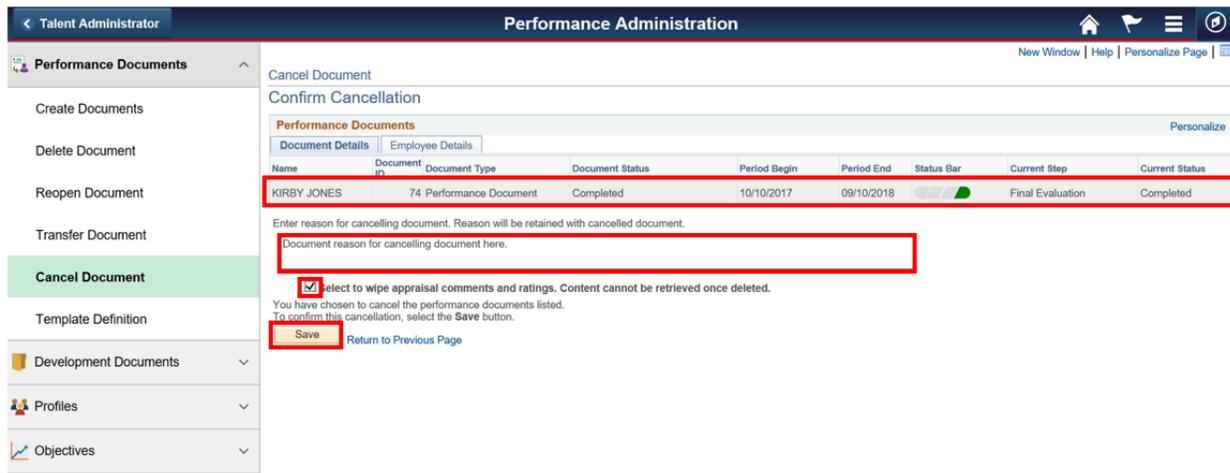
- 6 On the *Confirm Cancellation* page, validate that the correct performance document has been selected.
- 7 Enter comments in the free-form text box to document the reason for cancelling.

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.

Document Search

Employee ID

Employee First Name

Employee Last Name

Manager ID

Manager First Name

Manager Last Name

Document ID

Document Type

Template Type

Document Status

Period Begin/End Dates

Additional Search Items

4 Select the performance document you wish to transfer.

**Performance Documents**

To manage a performance document, enter the search criteria and select the document from the resulting list.

4 row

Document Details Organization Details

Name / Job Title	Manager Name	Document Type	Document Status	Period Begin / Period End	Next Due Date
Michelle Lee Human Resources Specialist (CI)	Cheryl Cato	Document ID 39380 Performance Document GSA	Canceled 	11/14/2018 09/30/2019	>
Michelle Lee Human Resources Specialist (CI)	Cheryl Cato	Document ID 40673 Performance Document GSA	Evaluation in Progress 	10/01/2018 09/30/2019	11/14/2019 >
Michelle Lee Human Resources Specialist (CI)	Cheryl Cato	Document ID 22677 Performance Document GSA	Completed 	01/22/2018 09/30/2018	>
Michelle Lee INTERSYSTEM MOVEMENT	Cheryl Cato	Document ID 14312 Performance Document MASSRATE	Completed 	05/31/2017 09/30/2017	>

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

6 Select Modify Supv Level.

**Performance Document** x

**Performance Document** GSA  **Open**

Employee 00004831 Michelle Lee [Details >](#)

Document ID 40873

---

Manager ID 00013125 Ch Period 10/01/2018 to 09/30/2019 >

Document Status Evaluation in P Approval Status Not Submitted

**Actions** x

- View Step >
- Modify Issue Date
- Modify Supv Level**

Step	Due Date	Signatures
<input checked="" type="checkbox"/> Establish Performance Plan <small>Issue Date: 11/15/2018</small>	11/14/2018	Mgr: Cheryl Cato 11/15/2018 15:02:24 EE: Michelle Lee 11/15/2018 15:38:52 [ACKN]
<input checked="" type="checkbox"/> Complete Mid-Year Progress Review	05/31/2019	Mgr: Cheryl Cato 05/31/2019 10:29:57 EE: Michelle Lee 05/31/2019 12:35:38
<input checked="" type="checkbox"/> Nominate Participants <small>Jason Smith-Accepted</small>	11/14/2019	Peer: Jason Smith 07/25/2019 15:20:20
<input type="checkbox"/> Nominate Participants <small>Hillary Jeffrey-Pending</small>	11/14/2019	
<input checked="" type="checkbox"/> Review Employee Self-Assessment	11/14/2019	EE: Michelle Lee 07/25/2019 15:10:58
<input type="checkbox"/> Review Manager Evaluation	11/14/2019	

- 7 Enter a New Supervisor Level.
- 8 Enter comments in the Comments field.
- 9 Select Save.

**Supervisor Level** **Save**

**Cancel**

Select a **New Supervisor Level** and click **Save** to update the employee's Supervisor Level for this document. This will change the 40% Supervisor Element requirement for the performance plan.

Set ID GSASH

Supervisor Level 8 Non-Supervisory

New Supervisor Level  Leader

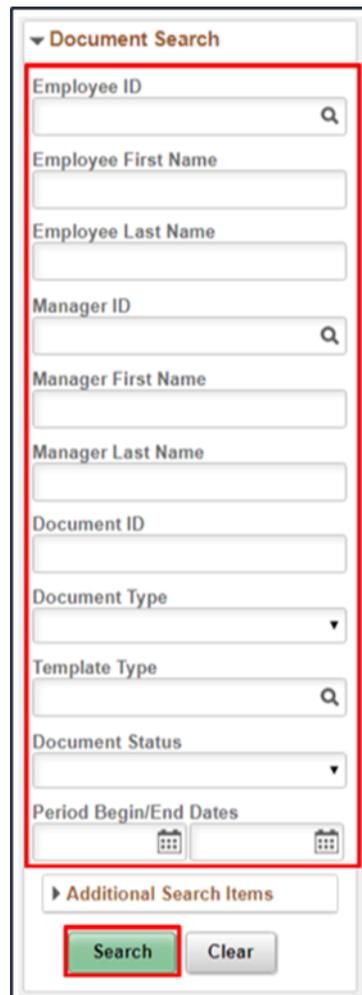
Comment

## 1.6.2 Override Evaluation

- 1 Select the Performance Documents [Admin] tile.



- 2 Enter the search criteria of the desired employee.
- 3 Select Search.

A vertical search form titled "Document Search" with a dropdown arrow. The form contains several input fields: "Employee ID" (with a search icon), "Employee First Name", "Employee Last Name", "Manager ID" (with a search icon), "Manager First Name", "Manager Last Name", "Document ID", "Document Type" (dropdown), "Template Type" (with a search icon), "Document Status" (dropdown), and "Period Begin/End Dates" (with calendar icons). Below these fields is a section titled "Additional Search Items" with a right-pointing arrow. At the bottom of the form are two buttons: "Search" (highlighted with a red box) and "Clear".

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

<b>James Watkins</b> Contract Specialist	Bryon Boyer	Document ID 38424 Performance Document GSA	Approval - Approved 	10/01/2018 09/30/2019	11/14/2019 >
<b>Marjusz Lewandowski</b> INTERSYSTEM MOVEMENT	Liliana Delbonifro	Document ID 23373 Performance Document GSA	Approval - Approved 	10/01/2017 03/31/2018	11/14/2018 >
<b>Mohammed Berlas</b> Chief Information Security Off	Vanessa Ros	Document ID 57914 Performance Document GSA	Approval - Submitted 	10/01/2018 09/30/2019	11/14/2019 >
<b>Tammy Pior</b> 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 x

**Performance Document** GSA

Employee 00006198 Mohammed Berlas [Details >](#)

Document ID 57914 Level 5 Outstanding

Open

Manager ID 00018405 Vanessa Ros >

Period 10/01/2018 to 09/30/2019 >

Document Status Approval >

Approval Status Submitted >

Step	Due Date	Signatures
<span style="color: green;">✔</span> Establish Performance Plan <span style="float: right; color: green;">⌵</span> <small>Issue Date: 02/27/2019</small>	11/14/2018	<small>Mgr: Vanessa Ros 02/27/2019 11:45:58</small> <small>EE: Mohammed Berlas 02/27/2019 12:07:35 [ACKN]</small>
<span style="color: green;">✔</span> Complete Mid-Year Progress Review <span style="float: right; color: green;">⌵</span> <small>Skipped</small>	05/31/2019	
<span style="color: gray;">○</span> Nominate Participants	11/14/2019	
<span style="color: gray;">○</span> Review Employee Self-Assessment	11/14/2019	
<span style="color: orange;">●</span> Review Manager Evaluation <span style="float: right; color: green;">⌵</span> <small>Pending Approval</small>	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

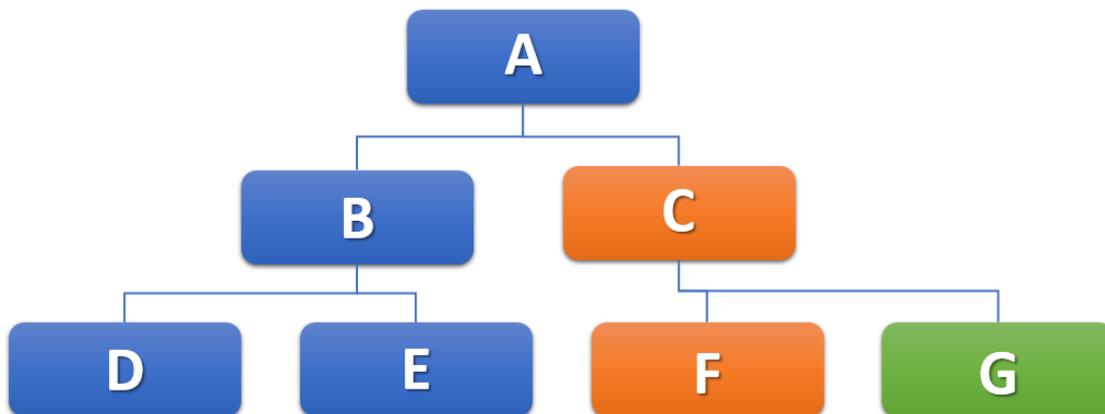
This topic will cover creating business objectives. Business Objectives are organizational goals/objectives that are cascaded down to employee performance plans, to align to performance elements.

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.

Objective Plan	Objective Plan Begin date	Objective Plan End Date
<a href="#">GSA Organizational Objectives</a>	10/01/2016	09/30/2020

- 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.

Objective Plan GSA17 GSA Organizational Objectives

Search Criteria

Set ID GSASH

Department

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

**Create Business Objectives**  
**Select Objective Plan**  
Choose an Objective Plan by selecting the appropriate hyperlink

Objective Plan	Objective Plan Begin date	Objective Plan End Date
<b>GSA Organizational Objectives</b>	10/01/2016	09/30/2020

- 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.

**Create Business Objectives**  
Complete the information in the *Home Page Creation Details* section.  
Once the creation details have been chosen, select the **Create Page** pushbutton to generate the objective page(s).

**Home Page Creation Details**

Objective Plan GSA Organizational Objectives

Effective Date 10/01/2017

Template GSA Organizational Objectives

Publication Due Date 10/01/2017

Set Owner to Department Manager

**Department Selection** Personalize | Find | First 1 of 1 Last

Set ID	Department ID	Department Name
GSASH	10PRAA	Contracting

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.

New Window | Help | Personalize Page | 

## Create Objective Pages - Confirmation

**Home Page Creation Details**

**Objective Plan** GSA Organizational Objectives

**Effective Date** 10/01/2017

**Template** GSA Organizational Objectives

### Pages Created

The following Objective Pages have been successfully created.

**Selected Departments** Personalize | Find |  |  First 1 of 1 Last

Set ID	Department	Description	Page Owner	Message
GSASH	10PRAA	Contracting		Page Created Successfully. Page Owner Unassigned.

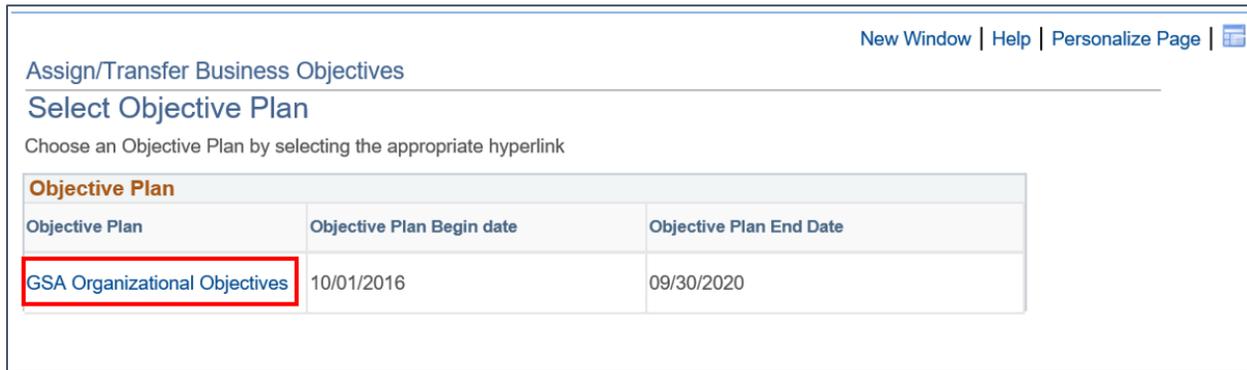
Next, assign a business objective owner.

### 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.

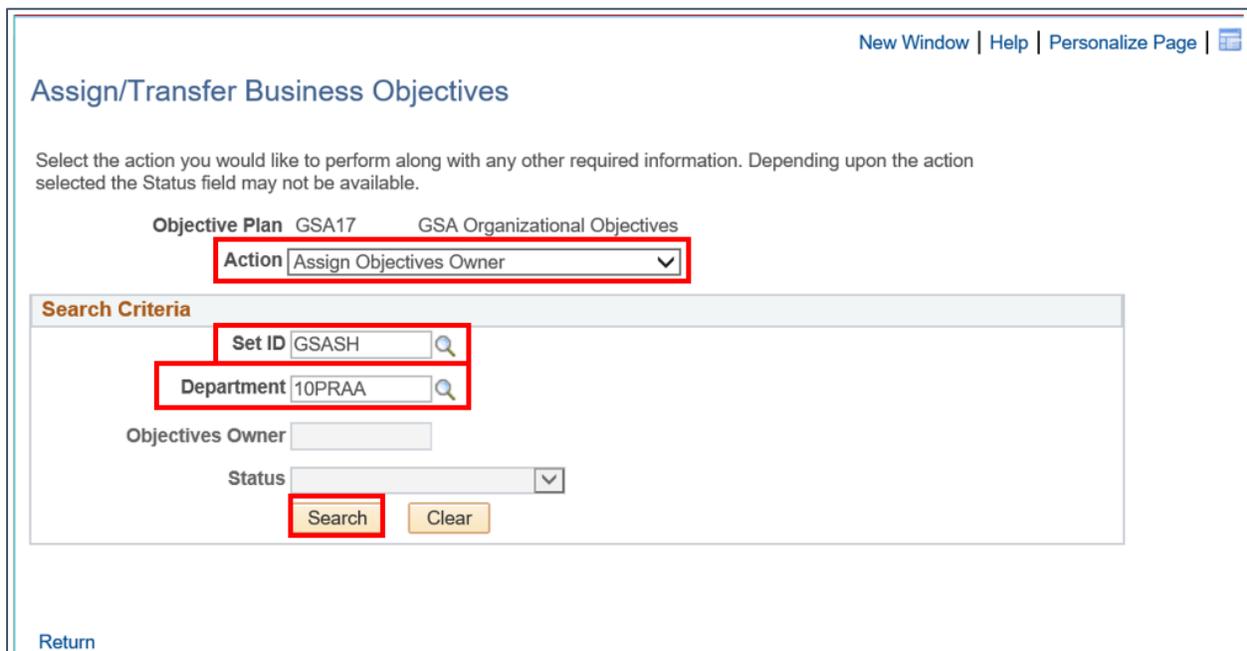
- 1 Select GSA Organizational Objectives.



The screenshot shows the 'Assign/Transfer Business Objectives' page. The title is 'Assign/Transfer Business Objectives' and the sub-header is 'Select Objective Plan'. Below the sub-header, it says 'Choose an Objective Plan by selecting the appropriate hyperlink'. There is a table with three columns: 'Objective Plan', 'Objective Plan Begin date', and 'Objective Plan End Date'. The first row in the table has 'GSA Organizational Objectives' in the first column, '10/01/2016' in the second, and '09/30/2020' in the third. The 'GSA Organizational Objectives' text is highlighted with a red rectangular box.

Objective Plan	Objective Plan Begin date	Objective Plan End Date
GSA Organizational Objectives	10/01/2016	09/30/2020

- 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.



The screenshot shows the 'Assign/Transfer Business Objectives' page. The title is 'Assign/Transfer Business Objectives'. Below the title, it says 'Select the action you would like to perform along with any other required information. Depending upon the action selected the Status field may not be available.' There are two dropdown menus: 'Objective Plan' with 'GSA17' selected and 'GSA Organizational Objectives' as the label, and 'Action' with 'Assign Objectives Owner' selected. Below these is a 'Search Criteria' section with three input fields: 'Set ID' with 'GSASH', 'Department' with '10PRAA', and 'Objectives Owner' which is empty. There is also a 'Status' dropdown menu which is empty. At the bottom of the search criteria section are two buttons: 'Search' and 'Clear'. The 'Search' button is highlighted with a red rectangular box.

- 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.

The screenshot shows the 'Assign Objectives Owner' page with a 'Person Search' dialog box. The dialog box has a 'Search Criteria' section with fields for Name, Last Name, Second Last Name, First Name, and ACName. The 'Search' button is highlighted in red. The 'Select a Page Owner' button on the main page is also highlighted in red.

Title	Set ID	Department Description	Status	Objectives Owner
GSA Organizational Objectives for <Unknown>	GSASH	Contracting	In Progress - Unassigned	

11 Select Complete

The screenshot shows the 'Assign Objectives Owner' page with the 'Complete' button highlighted in red. The 'New Page Owner' is now listed as 'Janet Abbot'.

Title	Set ID	Department Description	Status	Objectives Owner
GSA Organizational Objectives for <Unknown>	GSASH	Contracting	In Progress - Unassigned	

Once 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.

### Manage Business Objectives

#### Select Business Objectives

Enter search criteria to find the objective pages you would like to manage. To Update your Business Objectives, select the Update hyperlink. To View the Objectives, select the View hyperlink.

Objective Plan GSA17

**Search Criteria**

Set ID	GSASH	<input type="text"/>
Department	10PRAA	<input type="text"/>
Objectives Owner	00046046	<input type="text"/>
Status	In Progress - Assigned	<input type="text"/>

- 4 Select Update.

Business Objectives						
Title	Set ID	Department Description	Status	Objectives Owner	Update Objectives	View Objectives
GSA Organizational Objectives for <Unknown>	GSASH	Contracting	In Progress - Assigned	Janet Abbot	<a href="#">Update</a>	<a href="#">View</a>

- 5 Modify the objective's *Title*, if applicable. Add an *Alternate Editor*, if desired.
- 6 Select Add Organizational Goals to begin adding organizational objectives.

Update Objectives  
Department 10PRAA - Contracting

Department 10PRAA - Contracting  
Period 10/01/2016 To 09/30/2020  
Objective Plan GSA17 GSA Organizational Objectives  
Template ID GSA GSA Organizational Objectives

---

Effective Date 10/01/2017  
Status In Progress - Assigned  
Title GSA Organizational Objectives for the Contracting Office

Objectives Owner 00046046 Janet Abbot  
Owner Title Environmental Program Expert  
Alternate Editor

---

Save Cancel Preview Submit For Publication View Different Objectives

---

Expand All Collapse All

▼ Section 1 - Organizational Goals

+ Add Organizational Goals

---

Save Cancel Preview Submit For Publication View Different Objectives

- 7 Enter the order you want the goal to display, the *Title* and the *Description*.
- 8 Select Add.

Update Objectives  
Add Organizational Goals

Enter the details. When you are finished, select the Update button to save your entry.

Display Order

Title Strategic Goal 1: Save taxpayer money

Description Save taxpayer money through better management of Federal real estate.  
GSA will achieve cost savings for the Federal Government by enhancing asset management and optimizing space utilization to provide the best price in Federal leased and owned real estate. Effective and

Default Business Objective Page is not yet Published.

Aligned To

Add Return To Objective Page

- 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.

▼ Section 1 - Organizational Goals

Expand Collapse

▼ **Strategic Goal 1: Save taxpayer money**

**Title** Strategic Goal 1: Save taxpayer money  

**Description :**  
Save taxpayer money through better management of Federal real estate.

GSA will achieve cost savings for the Federal Government by enhancing asset management and optimizing space utilization to provide the best price in Federal leased and owned real estate. Effective and integrated delivery of workspace solutions will provide our customers the opportunity to focus time and resources on their mission-related operations. Greater integration and consistency of our services will also improve the experience of our Federal customers.

**Aligned To**

Last Modified By on 2018-03-07

 Add Organizational Goals

Save Cancel Preview **Submit For Publication**  [View Different 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.

**Publish Business Objectives**

### Select Page to Publish

Enter search criteria to find the objective pages that you want to publish. Select the checkbox next to each page you want to publish and then select the Continue button.

Objective Plan GSA17 GSA Organizational Objectives

**Search Criteria**

Set ID

Department

Status

**Business Objectives**

Select	Title	Set ID	Department Description	Status	Objectives Owner
<input checked="" type="checkbox"/>	GSA Organizational Objectives for the Contracting Office	GSASH	Contracting	Ready to Publish	Janet Abbot

Select All Deselect All

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

**Publish Business Objectives**

### Confirm Publication

You have chosen to Publish the Objective Pages listed. To confirm this, select the Publish Pages button.

**Business Objectives**

Title	Set ID	Department Description	Status	Objectives Owner
GSA Organizational Objectives for the Contracting Office	GSASH	Contracting	Ready to Publish	Janet Abbot

[Return](#)

- 6 Select OK.