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HR Admin Login

First login to myPerformance using your single sign on (SSO). Click on the gear icon in the upper right corner, then Control Center, then HR Admin.

Select Process Details for the appraisal process of interest.

Select Participant Center, Notification Center, or Report Center, from the navigation menu on the left.

Username/Password Issues

Problems Logging In
Why would someone have trouble logging in to myPerformance? With single sign on now enabled, it could be:

- They are not using their University credentials
- They have not been “picked up” in the load from PeopleSoft as a user in the tool

If you are unable to assist the user, refer them to the Division of IT.
Adding Users

Please note the difference between the User Center and the Participant Center. The User Center houses all University of Missouri employees. The Participant Center is unique to each process (e.g., FY14 Appraisal Process, FY15 Appraisal Process, etc.).

As an HR Admin you will be granted access to the records of employees for which you are assigned the “HR Rep” role. If you should be granted access to additional individuals or departments, please send the DEPT ID to myPerformance@missouri.edu and the update will be made. Note, HR Rep assignments will only be made by department and each participant can have only one HR Rep.

Editing Users

Changes in the User Center
Changes within the User Center are driven by changes in PeopleSoft. Because PeopleSoft is our system of record, updates (e.g., changes in reporting relationships) should be made in PeopleSoft which will filter to myPerformance. For additional assistance, contact myPerformance@missouri.edu.

Changes in the Participant Center
1. Click Process Details on the process you need to add the user to
2. Click Participant Center

To remove an individual from the Participant Center (e.g., faculty not involved in the evaluation process), check the box to the left of their name(s) and click Remove Selected Items.

If someone is deleted from the Participant Center by mistake, contact myPerformance@missouri.edu to add the individual again.

To edit roles in the Participant Center (e.g., to be evaluated, manager/evaluator). Note the colored icons to the left of the participants’ names.

To change Roles, click the checkbox to the left of the name(s) of the participant(s). Then click the Assign Role(s) button. When prompted, check the boxes corresponding to the appropriate Roles for the individual(s).
Managing a Process

During a process, you may have to roll back (or revert) a user’s steps. Most common is that the second level reviewer has a lot of changes for the manager and would like the manager to make those changes before he/she approves it. You may also need to administratively complete certain steps for certain users (e.g., a self-appraisal).

How to Roll Back or Complete Steps

When in the Participant Center, click on the Status link. When the status window pops up, you’ll be able to see what step the user is currently on and who is responsible for each step.

Roll back a step by clicking the radio button next to the step and clicking Rollback Status. You can choose to delete data in the form if necessary by clicking the Delete Appraisal response data or Delete Self-Appraisal response data check boxes and then clicking Rollback Status.
Complete a step by clicking the Complete box on the far right to the step you need to be completed. A small orange shield will show up next to the person responsible name after you do this; this indicates that an administrator completed that particular step. It is recommended to have documentation supporting an administrator completing a step, particularly in the case of employee or manager sign off.

Reassigning Forms
myPerformance forms are assigned based upon the employees grade or level in their salary administration plan. All union eligible employees are assigned to a form specifically designed for their job code comprised of the sections below.

<table>
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<tr>
<th>GGS Grades</th>
<th>Key Responsibilities (1 to 7)</th>
<th>Performance Goals (1+)</th>
<th>Success Factors (7)</th>
<th>Leadership Competencies (5)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Union Eligible</strong></td>
<td>n/a</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td><strong>Employee</strong></td>
<td>1 – 10</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td><strong>Leader</strong></td>
<td>11 – 15</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td><strong>Executive</strong></td>
<td>16+</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
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</table>

To determine the grade of a particular title, use the Job Code Detail search function. This information can also be found by individual on the Salary Admin Plan panel in the employee’s Job Data record in PeopleSoft. Because form assignment is programmatic, please contact myPerformance@missouri.edu for assistance reassigning.
Reporting

There are several reports available to you for each process. Descriptions of each are below. To access reports, go into the process of interest, and click on Report Center. All reports have the option of exporting into Excel by clicking Export.

Detailed Status and Custom Notifications

Provides information during an open process on what steps each user is at
- Filters by Group or by User Field are available at the top
  - Be sure to click Update Now to update the report according to the filters you choose
- Extended Report provides specific information about which user is at what step

Email reminders can be sent to employees with Appraisals Currently In This Step by clicking the Envelope in the Notify column. The generated email can be customized or used as is. It will be sent to everyone at once through a mail merge.

**Group Scores**
Provides overall scores by Group
- Several filters available for within each group
- Report only provides user name, manager name, and overall score

**Competency Rating**
Provides rating distribution percentages specific to each competency
• Several **User Fields** are available for filtering based

**On Time Reports**
Provides information on how many users completed each step on time
• Filters by **Group** or by **User Field** are available at the top
  ○ Be sure to click **Update Now** to update the report according to the filters you choose

**Development Plan**
Provides users’ development plans
• Filters by **Group** or by **User Field** are available

**Goals**
Provides users’ performance goals
• Gives options on what goal details you want included in the report
• Several filters are available based on status of the appraisal, **Group**, and **User Field**

**Export Responses**
Has three separate reports that allow you to pull out more information than the other canned reports
• Allows you to choose which fields you’d like to export from the **User Center** and/or Process
Filters by Group, User Field, status, and manager and/or self-appraisal are available.

Three different types of reports are available in this report:

- **Form Section Response Export**
  - Allows you to pull out certain sections of the forms (e.g. ratings on each Success Factor)

- **Subject Information Export**
  - Allows you to create a report based on any of the fields and filters described above

- **Appraisal Step Status Export**
  - Allows you to pull more information about users’ statuses during a process than the Detailed Status report described above

**Word Cloud**

*Generates a word cloud based on comments in the form*

- Filters by Group, User Fields, and form name are available
- Several display options are available
- Common words (e.g. University) can be excluded

Note, **Dashboard** reports are not described specifically here because they provide the same information as the reports above except in a visual manner. To get to the Dashboard, go into the process you want the report for, then click on Dashboard.