Administrator 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. This is called the “backend” of the system.

Select Process Details for the appraisal process of interest.

Accessing Appraisal Data

From the backend, select Process Details of the process of interest. Then select Participant Center from the navigation menu on the left. Search for the individual of interest using part or all of their last name.
Click Find. Available appraisal data can be viewed, saved, or printed by clicking on the magnifying glass icon.

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., FY15 Appraisal Process, FY16 Appraisal Process, etc.).

Benefit eligible users are added to the User Center through an established data feed with PeopleSoft. Participants are added to the Participant Center for each process manually and programmatically assigned an appraisal form based on their subfunction. The addition of participants should be handled by the HR Service Center. The request can be made by emailing myPerformance@missouri.edu.

Non-benefit eligible users are added to the User Center through a manual upload of PeopleSoft data. Upon department request, those individuals can then be added to the Participant Center for each process manually and programmatically assigned an appraisal form based on their subfunction. The addition of participants should be handled by the HR Service Center. The request can be made by emailing myPerformance@missouri.edu.
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.

Department HR Reps are assigned in the User Center. Each employee can have one HR Rep assigned to their account. MU utilizes the HR Rep security for one chosen representative per CSD.

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.

Managing a Process
You may have to take action to assist with the completion of steps during a process such as:
- Roll back (or revert) a users’ steps if, for example, the second level reviewer requests changes
- Administratively complete the step if the responsible party is unable or unwilling

Changing Roles
First, find the employee(s) in the Participant Center and check the box(es) next to their name(s). Click on the Assign Role(s) button. Check the boxes for the appropriate roles and click OK. If the person should not have any roles, they should be removed from the Participant Center.
Assigned roles can be verified easily utilizing the icons in the Participant Center. A orange icon 🟠 indicates the individual is an HR Representative, a blue icon 🟣 indicates the individual is a Manager/Evaluator, and a white icon indicates the individual is set To be evaluated 🔄.

**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 blue 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.
Steps can be completed for multiple individuals at the same time by checking the boxes next to the names in the Participant Center and clicking the Complete Steps button. Then select Mark select in-progress steps complete, choose the specific step (i.e., Employee writes self-appraisal), and click OK. To complete all steps at once, which is rarely done, select Complete all steps for selected users and click OK.
Reporting

There are several reports available to you for each process. Descriptions of each are below. Reports are available in the “backend” of the system depending on assigned security access. However, it is recommended that all users access reports from the user portal under the Reports tab. All reports have the option of exporting into Excel.

**Status Report**

*Provides information during an open process on what steps each user is at*

Select **Reports** from the top ribbon and then click the **pencil icon** for the report you wish to run. Reports can be filtered for many different fields using the **Add Filters** button. For this example, the report is filtered for Overdue appraisals in the College of Engineering.
Select **Add Filters** then select **Subject Division**

Type the division’s CSD code. When you see the division populate below the text field, click on it.
Select **Add Filters** then select **Task Status**

Select **Overdue**
Click the blue play button to run the report. Note: It may take several seconds or minutes for the report to run depending on its size.

Email reminders can be sent to employees by clicking the Envelope icon at the top right. 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*
- Use the same filtering technique as the Status Report
**Competency Rating**
*Provides rating distribution percentages specific to each competency*

![Competency Rating Interface](Image)

**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

**Development Plan**
*Provides users’ development plans*
- Filters by Group or by User Field are available
Definition of Key Terms

**Process** refers to a review period. For example, the **FY17 Appraisal Process** refers to the period of time from March 15 to June 30 of 2017 in which employees will be reviewed for their performance during the July 1, 2016 to June 30, 2017 fiscal year.

**Statues**
**Overdue** means an employee’s appraisal was not complete prior to the process deadline. For the FY17 Appraisal Process, reviews would not display as Overdue until July 1, 2017. It is important to distinguish this status from any separate completion deadline your college, school, or division sets.

**My To-Do** simply means you are the responsible party for a task that requires completion.

**Their To-Do** indicates another individual is the responsible party for a task that requires completion.

**Sent for Review** indicates an appraisal has been sent to another person for Third Party Feedback and that person has not submitted their feedback.

**Not Ready** refers to a future task you are responsible for that is not currently available because a prior step (or steps) in the process is not complete. For example, if your employee has not completed a self-appraisal, they will display as Not Ready in your “Write appraisals for your employees” tasks.

**Completed** indicates that the task for that step is complete and no further action is required. Note that you may have other tasks in other steps to complete for an individual.

**Participant Center vs. User Center**
The **User Center** is the master list of all benefit eligible employees in the entire University of Missouri. The **User Center** will list employees even if they do not participate in the appraisal process (e.g. faculty with no direct or indirect staff reports). It is populated directly by Peoplesoft data and automatically updated weekly.

The **Participant Center** is the master list of all employees that are participating in a particular appraisal process (e.g. FY16 Appraisal Process). Each fiscal year’s process has its own **Participant Center** that is unique from other years. It is populated manually using data from the **User Center**, but unlike the **User Center**, the **Participant Center** only includes those with a role in the appraisal process. The addition of participants should be handled by the HR Service Center. The request can be made by emailing myPerformance@missouri.edu.

Non-benefit eligible users are added to the **User Center** through a manual upload of PeopleSoft data. Upon department request, those individuals can then be added to the **Participant Center** for each process manually. The addition of participants should be handled by the HR Service Center. The request can be made by emailing myPerformance@missouri.edu.

**Workflow Steps** (as seen on reports)
1. Employee writes self-appraisal
2. Manager writes employee appraisals
3. Second level manager approves appraisals
4. Manager writes comments (Refers to the evaluator and employee discussion)
5. Employee sign-off
6. Manager sign-off