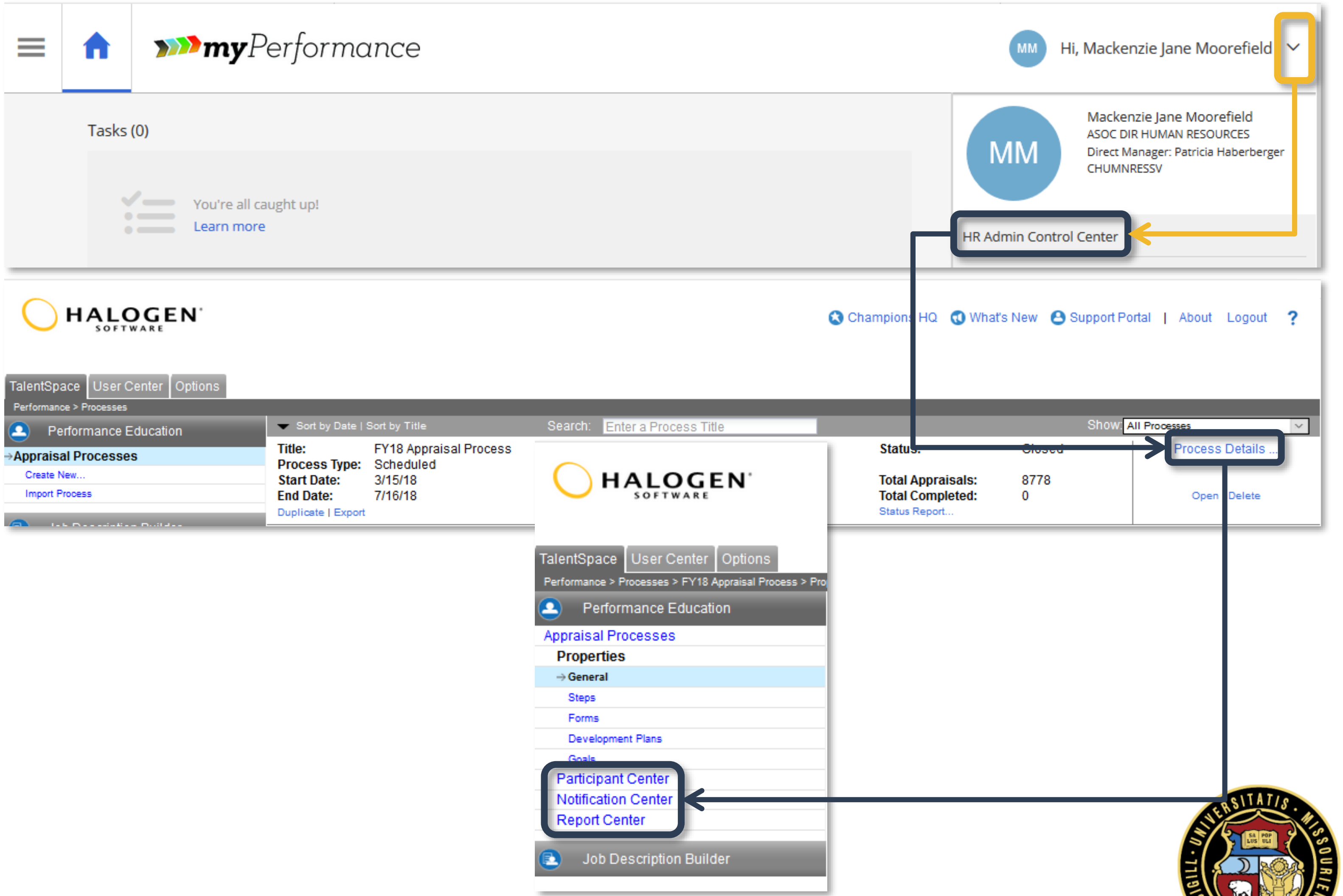
# myPerformance

HR Rep Guide

# Administrator Access

**<u>Administrator Portal ("back end")</u>**

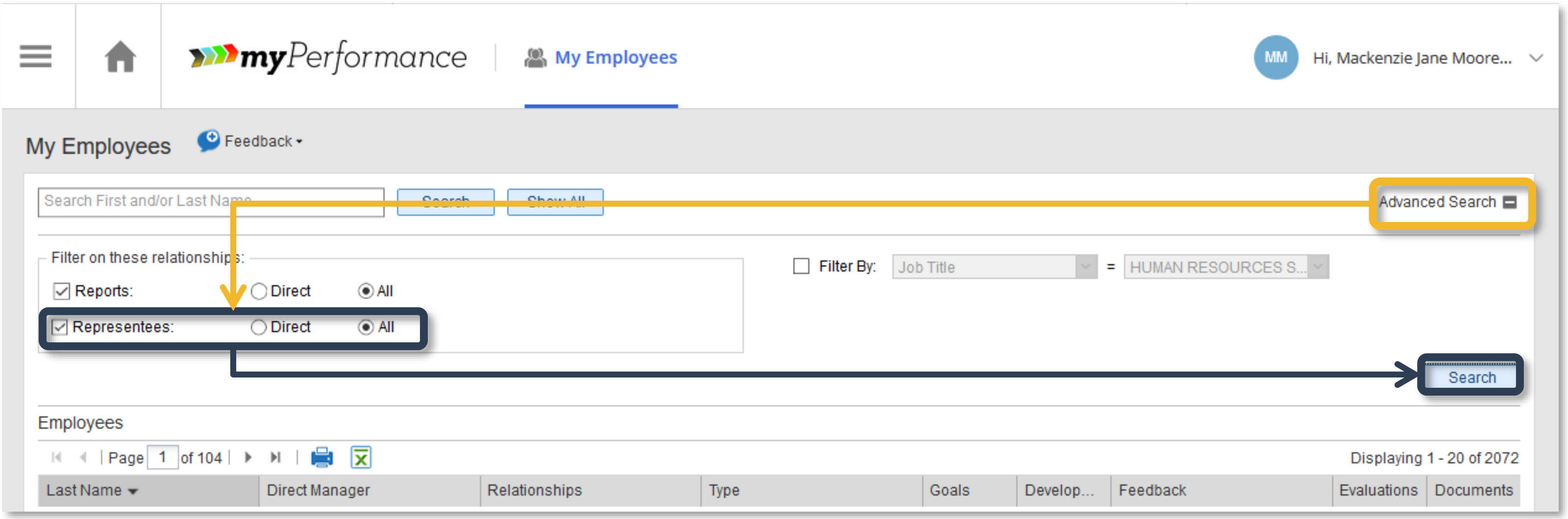
- First login to **myPerformance** using your single sign on. Click the dropdown in the upper right corner, then **HR Admin Control Center**.
- Select **Process Details** for the appraisal process of interest.
- Select **Participant Center**, **Notification Center**, or **Report Center**, from the navigation menu on the left.



# Administrator Access

**Viewing Representees (“front end”)**

- From the **My Employees** tab, open the **Advanced Search** menu.
- Check the **Representees** checkbox and choose either the **Direct** or **All** radio button.
- Click **Search**.
- **Goals**, **Development Plans**, **Feedback**, past **Evaluations**, and uploaded **Documents** will be available for review.

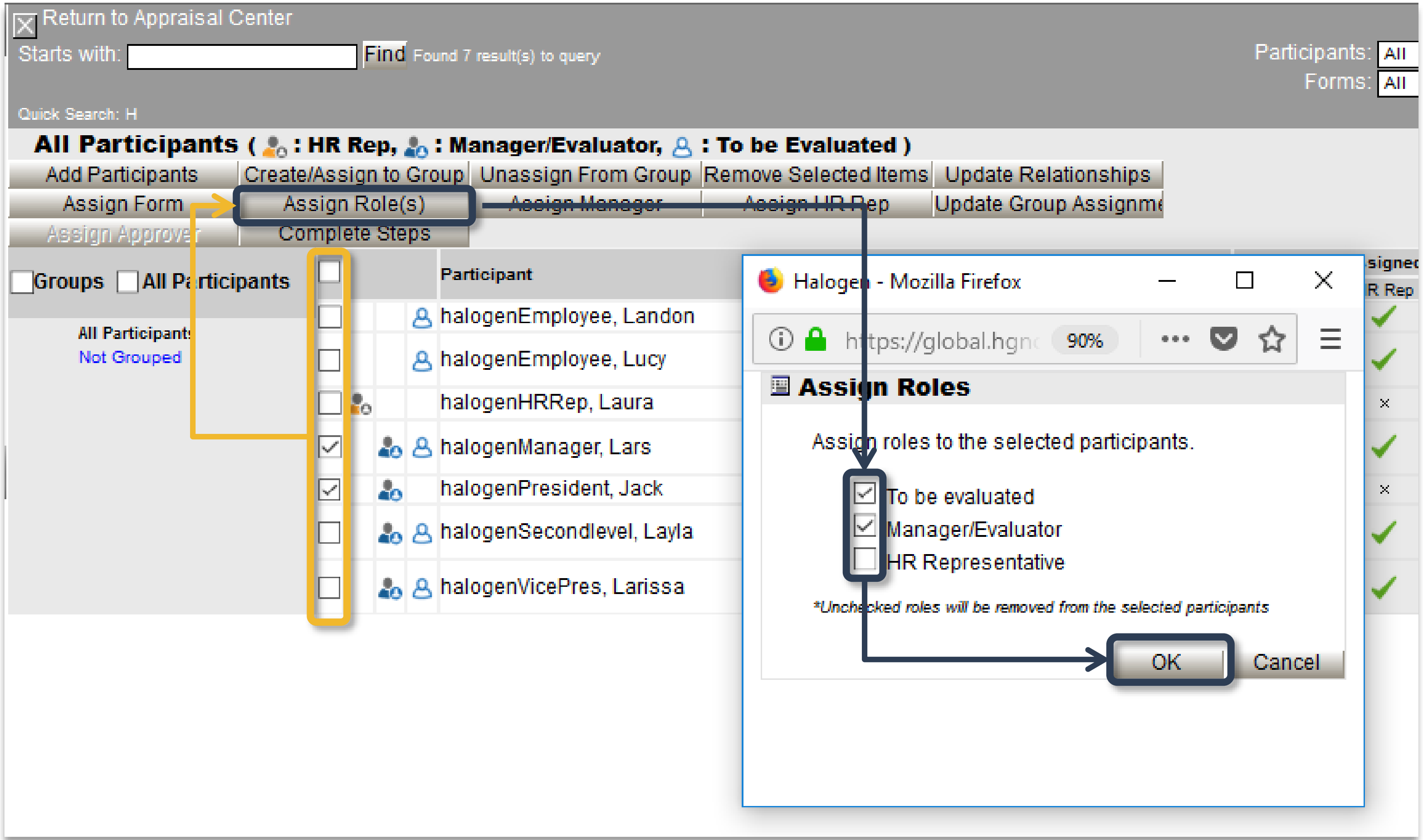


# Editing Participants

**<u>Changing Roles</u>**

- 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**:
  - **HR Rep or Admin**
  - **Manager/Evaluator**
  - **To be evaluated**

*Note, when editing roles, check all that apply as unchecked roles will be removed from the selected participants.*



# Editing Participants

**Removing Participants**

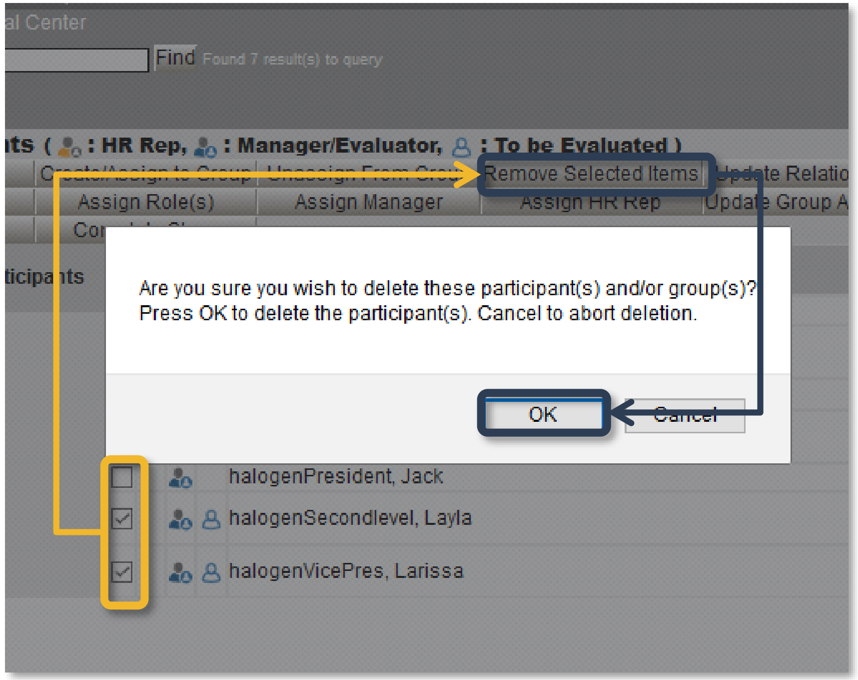
- If a participant should no longer be included in a process, they can be removed from the **Participant Center** so that their record is no longer included in reports.

*Examples of when participants should be removed:*

- *The participant terminates prior to an appraisal being drafted*
- *The participant will retire prior to the appraisal deadline and the supervisor has opted not to administer an appraisal*
- *The participant is probationary and the supervisor has opted not to use the appraisal as an opportunity to provide feedback and/or expose the employee to myPerformance*
- *Faculty who do not supervise staff*

*Examples of when participants should not be removed:*

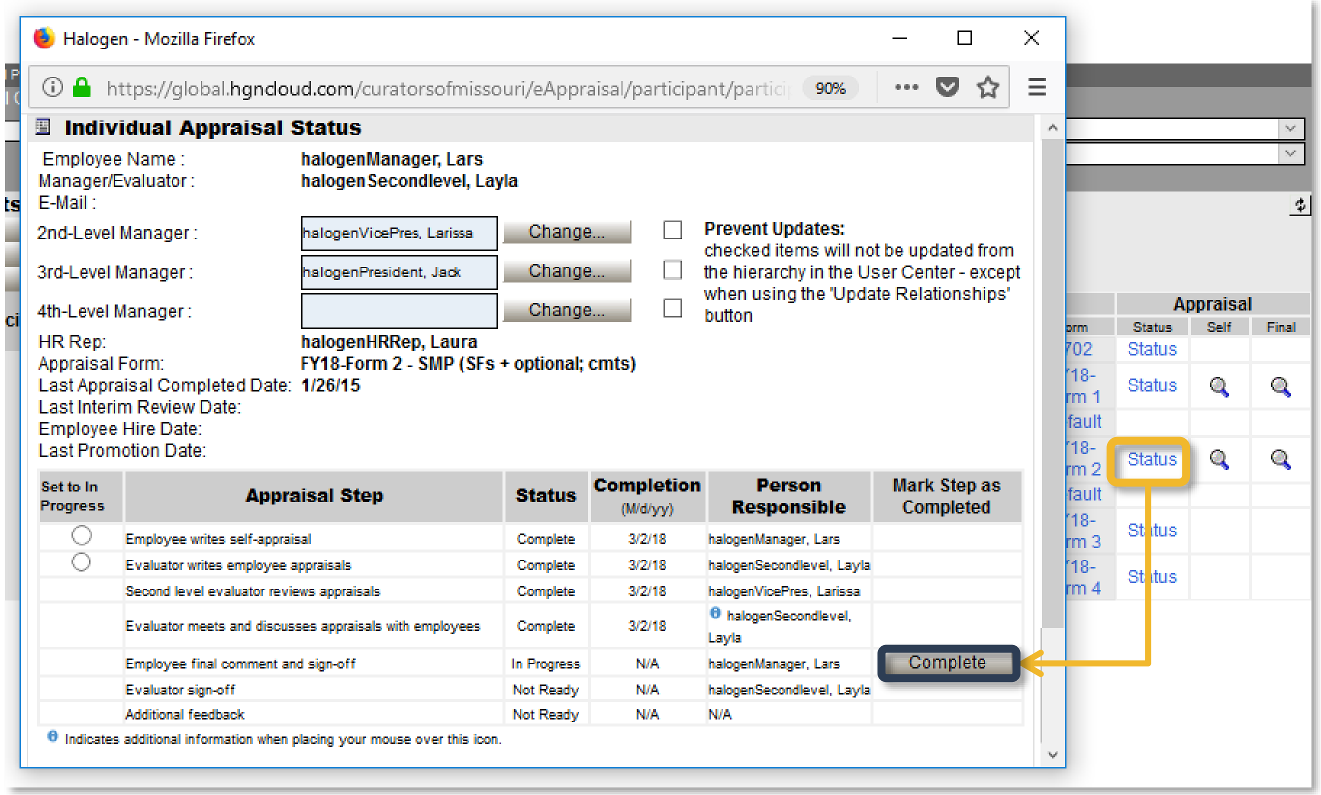
- *The participant is on a leave of absence during the appraisal window*
  - *In this instance, the self-appraisal should be administratively completed so that the supervisor can access the form*
- *The participant reports to a new supervisor, one on a leave, or a vacant position*
  - *New supervisors should utilize available department resources in an effort to provide feedback*
  - *Departments should make arrangements for coverage for leaves and vacancies*
- *The participant has a planned retirement in the coming year since the appraisal is focused on the prior year*



# Managing the Process

**<u>Administratively Completing Steps for a Single Participant</u>**

- 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.
- Complete a step by clicking the **Complete** button 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.
- To complete all steps at once, which is rarely done, click the **Complete All** button and click **OK** when prompted.



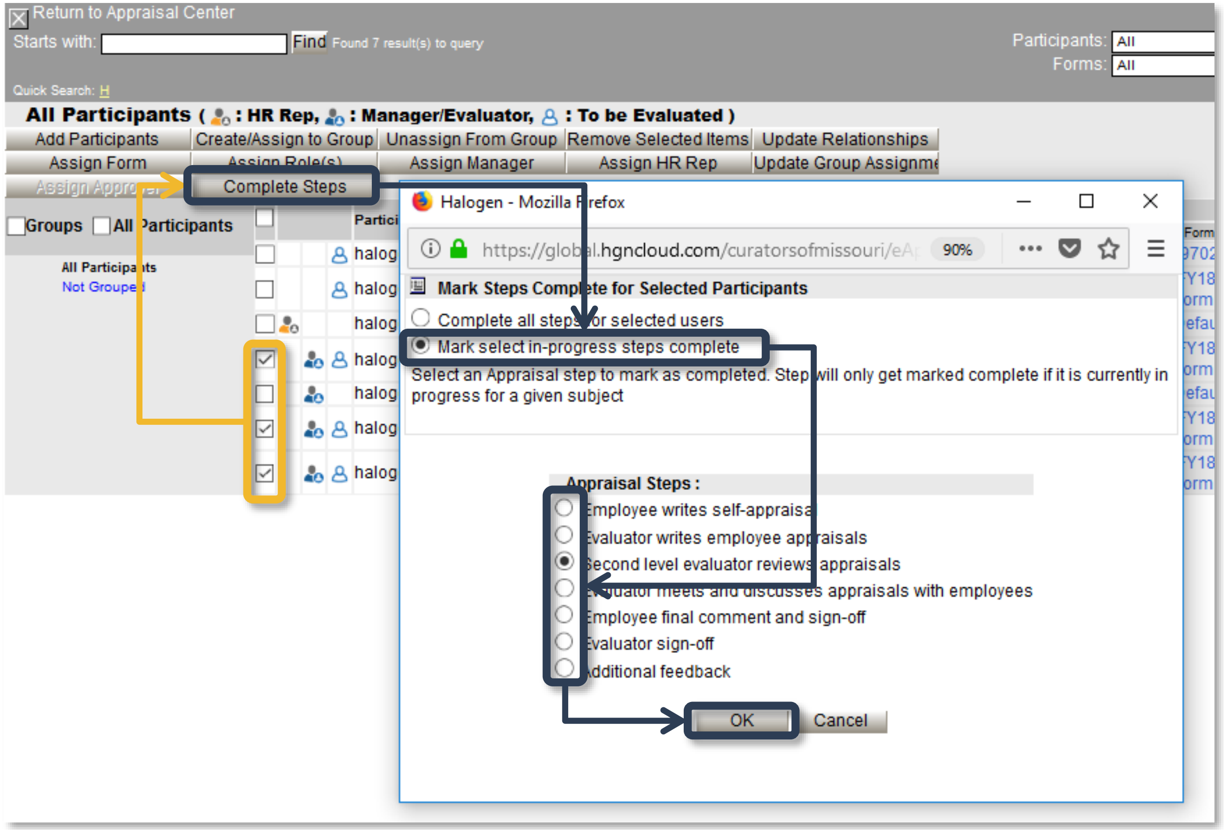

*Examples of when steps should be administratively completed:*

- *The participant terminates or is placed in layoff status prior to an appraisal being completed but some level of progress has occurred*
- *The participant is on a leave of absence and will not return before the process deadline*

# Managing the Process

**Administratively Completing Steps for Multiple Participants**

- 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.
- Steps can be completed for multiple individuals at the same time by checking the boxes next to their 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**.



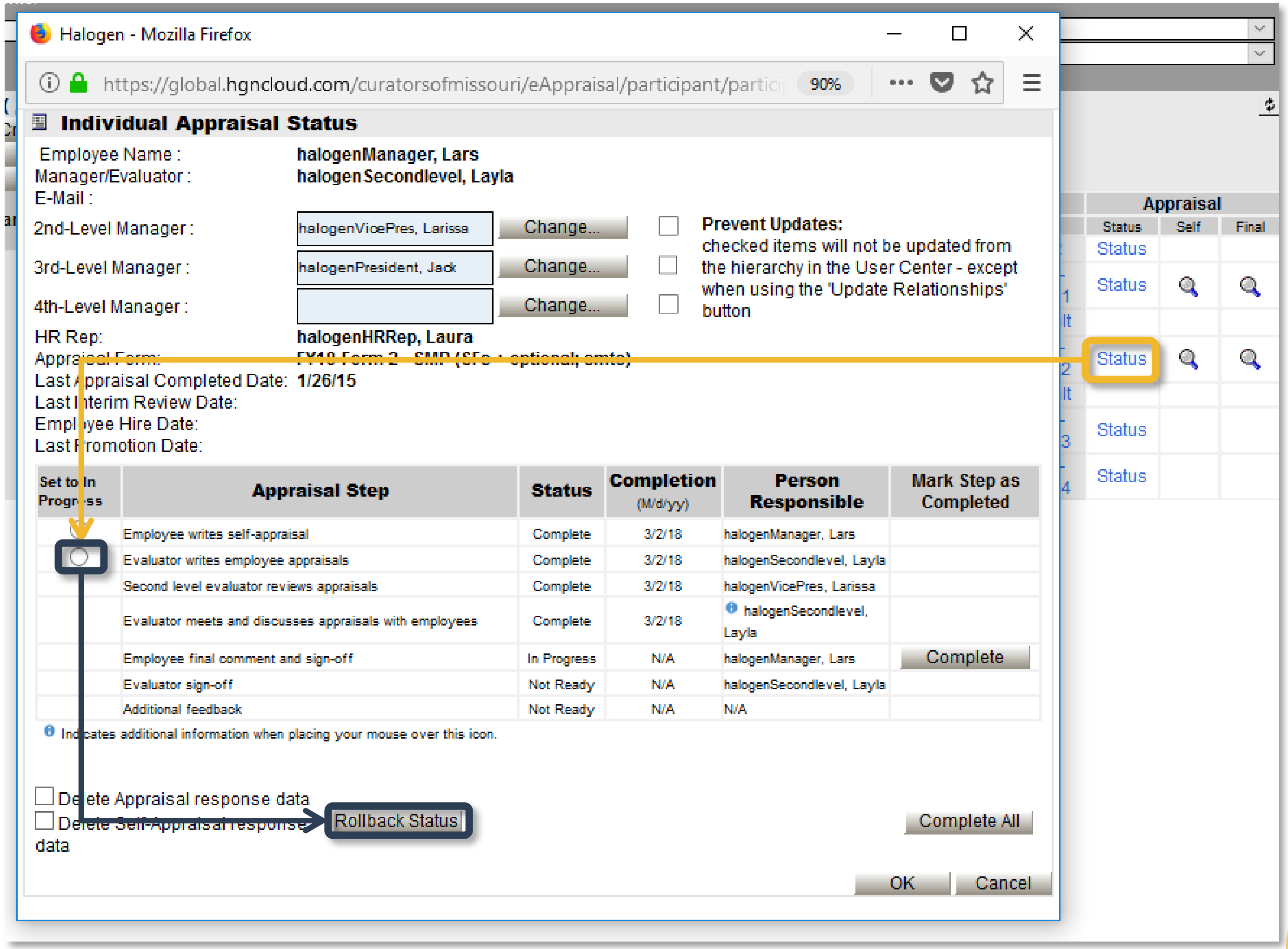

*Examples of when steps should be administratively completed for groups:*

- *The participants terminate or are placed in layoff status prior to the appraisals being completed but some level of progress has occurred*
- *The second level approver has completed their review outside of the tool (e.g., using reports or as a result of their calibration session)*

# Managing the Process

## Rolling Back 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** and then **OK** when prompted.
- 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**.

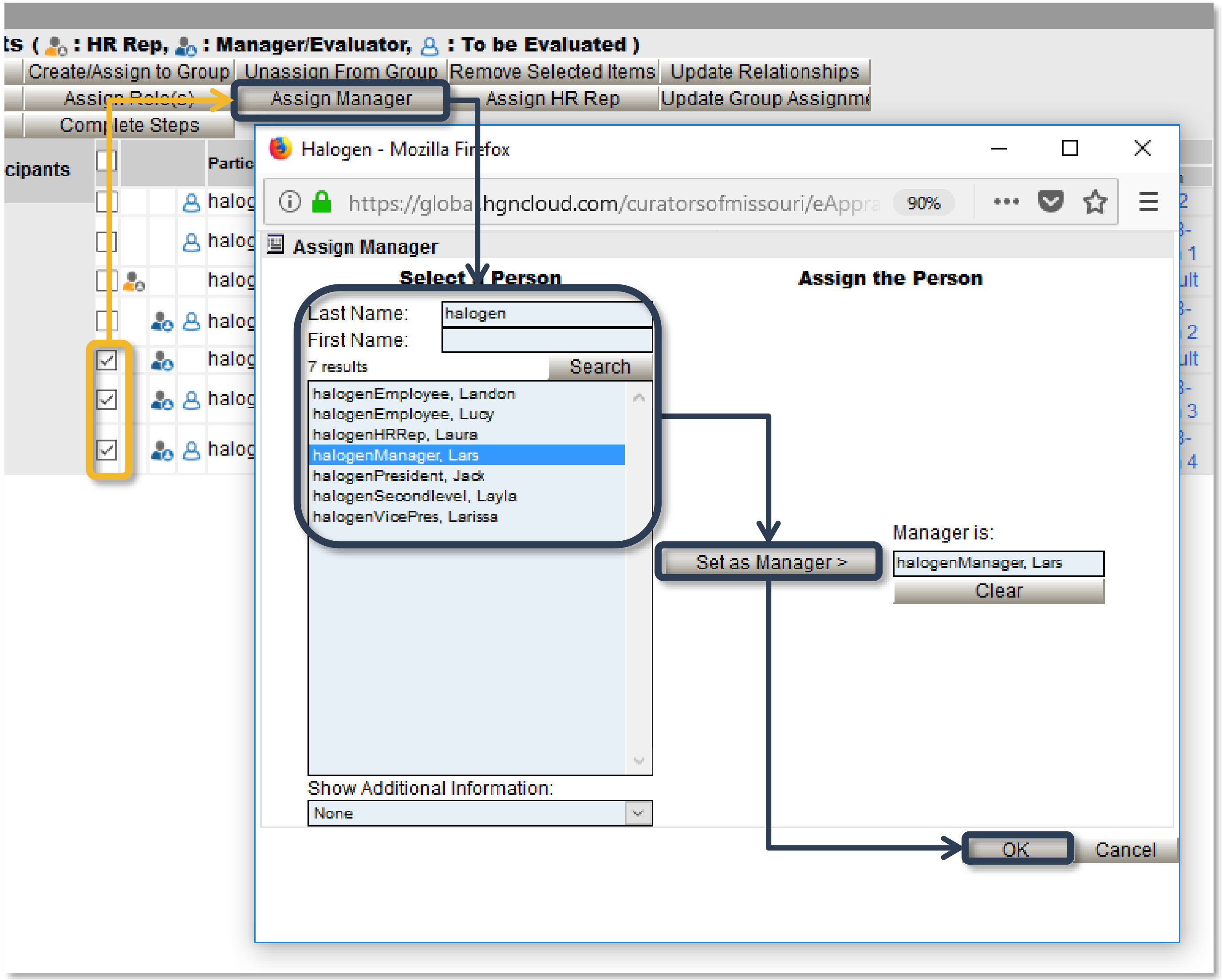


# Managing the Process

**Manually Changing a Manager/Evaluator**

- First, find the employee(s) in the **Participant Center** and check the box(es) next to their name(s). Click on the **Assign Manager** button.
- Search by Last Name, then highlight the desired name and click the **Set as Manager** button. Click **OK.**

*Note, this manual change will only be in effect until relationships are updated the following Monday morning.*

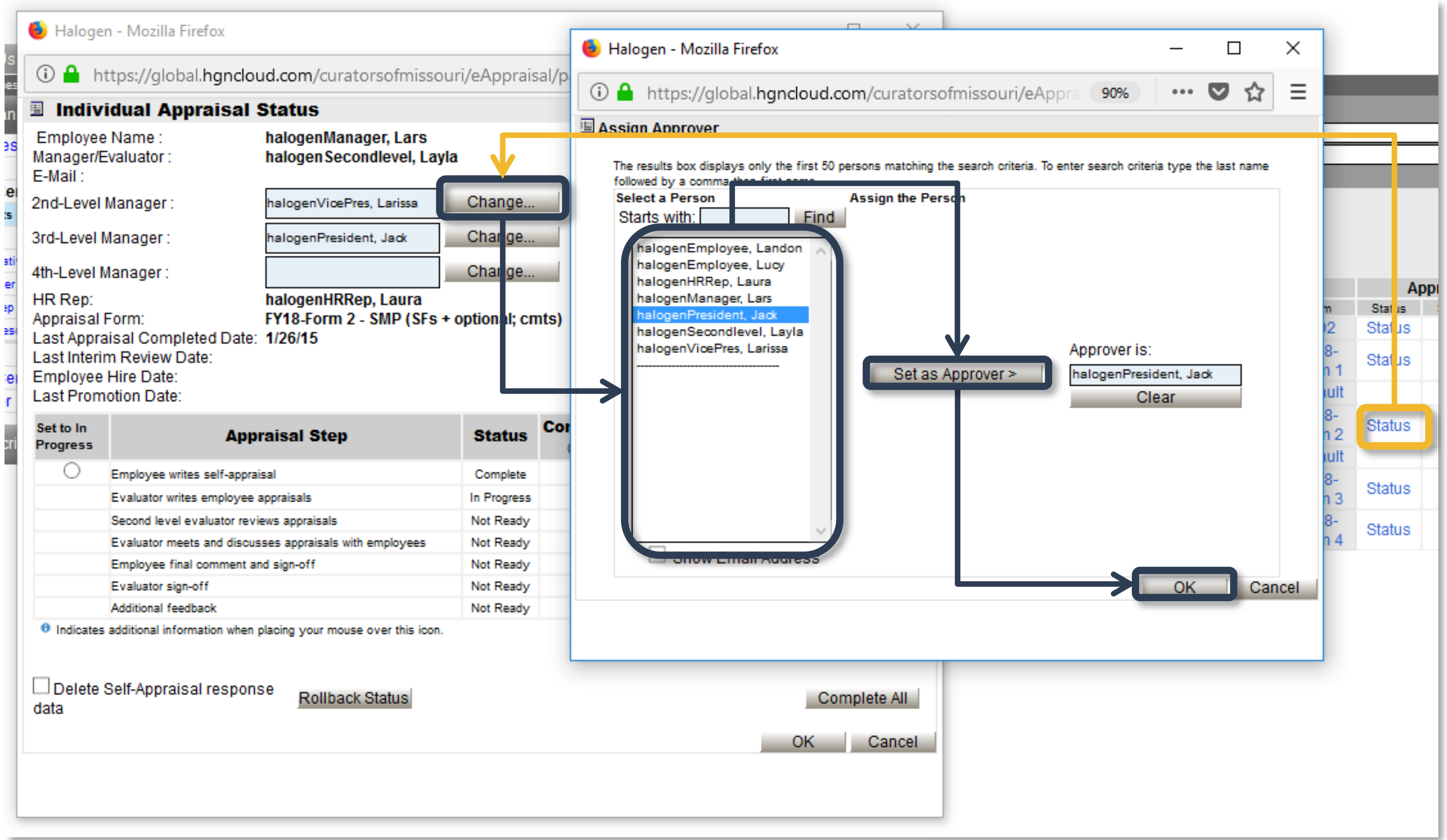


# Managing the Process

**Manually Changing a Second Level Manager**

- 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.
- Click on the **Change** button next to the **2nd Level Manager** filed.
- Search for the desired person or choose from the list. Click the **Set as Approver** button then **OK**.

*Note, this manual change will only be in effect until Participant Center relationships are updated (each Monday morning throughout the process).*



# Reporting

*Global customized Status and Score reports are available for each appraisal process.  Each begins with the fiscal year (e.g., FY18 Score Report).  It is recommended to use these reports instead of the delivered reports from Halogen.*

**<u>Status Report</u>**

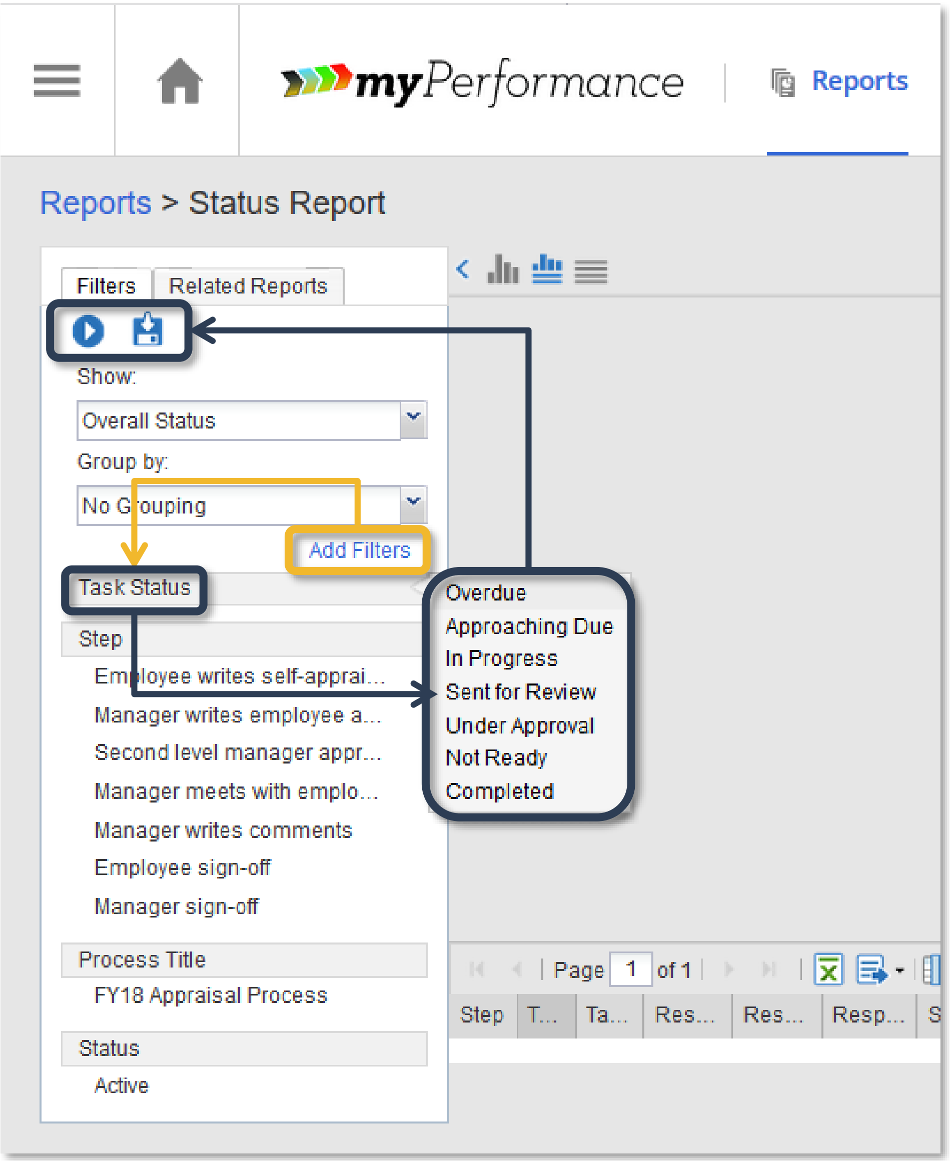
- Provides information during an open process on what steps each user is at along with detailed participant info

**<u>Score Report</u>**

- Provides overall scores and detailed participant info

**<u>Customizing Reports</u>**

- Select **Reports** from the top left menu, 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.  Filters can include Task Statuses, CSDs, etc.
- Click the **Blue Play Button** to run the report. Note, it may take several minutes for the report to run based on its size.
- To save an ne copy of the further customized report, click the **Disk** icon.  When prompted, title and describe as appropriate.



# Key Terms

- **Process** – a specified review period (e.g., the FY18 Appraisal Process refers to the period of time from March 15 to June 30 of 2018 in which employees will be reviewed for their performance during the July 1, 2017 to June 30, 2018 fiscal year).
- **User Center** – 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 nightly.
- **Participant Center** – the master list of all employees that are participating in a particular process. Each process has its own unique Participant Center. It is populated manually using data from the User Center.
- **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

*Statuses*

- **Overdue** – an employee's appraisal was not complete prior to the process or step deadline. It is important to distinguish this status from any separate internal completion deadline.
- **Sent for Review** – indicates an appraisal has been sent to another person for Third Party Feedback and that person has not yet 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 (e.g., 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, you may have other tasks in other steps to complete for an individual.