

myPerformance

HR Rep Guide



University of Missouri System

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Administrator Access

Administrator Portal (“back end”)

- 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.

The screenshot displays the myPerformance Administrator Portal. At the top right, a user profile for Mackenzie Jane Moorefield is shown with a dropdown menu. A yellow box highlights this dropdown, and an arrow points to a label 'HR Admin Control Center'. Below the profile, a 'Tasks (0)' section indicates the user is up to date. The main content area shows the 'Performance > Processes' section for 'FY18 Appraisal Process'. A table lists process details: Title (FY18 Appraisal Process), Process Type (Scheduled), Start Date (3/15/18), and End Date (7/16/18). A 'Process Details ...' link is highlighted with a yellow box and an arrow. The left navigation menu is open, showing 'Appraisal Processes' expanded with sub-items: General, Steps, Forms, Development Plans, and Goals. A yellow box highlights the 'Participant Center', 'Notification Center', and 'Report Center' options, with an arrow pointing to the 'HR Admin Control Center' label.

Sort by Date Sort by Title	Search: Enter a Process Title	Show: All Processes
Title: FY18 Appraisal Process		Status: Closed
Process Type: Scheduled		Total Appraisals: 8778
Start Date: 3/15/18		Total Completed: 0
End Date: 7/16/18		Status Report...
Duplicate Export		Open Delete



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.

The screenshot shows the 'My Employees' page in the myPerformance system. The page includes a search bar with a 'Search' button and a 'Show All' button. A yellow box highlights the 'Advanced Search' button. Below the search bar, there are filters for 'Filter on these relationships:' and 'Filter By:'. The 'Filter on these relationships:' section has two rows: 'Reports' with a checked checkbox and radio buttons for 'Direct' and 'All' (selected), and 'Representees' with a checked checkbox and radio buttons for 'Direct' and 'All' (selected). A blue box highlights the 'Representees' row. A 'Filter By:' section has a dropdown for 'Job Title' and a text input for 'HUMAN RESOURCES S...'. A 'Search' button is located at the bottom right of the search area. Below the search area, there is a table of employees with columns for 'Last Name', 'Direct Manager', 'Relationships', 'Type', 'Goals', 'Develop...', 'Feedback', 'Evaluations', and 'Documents'. The table shows 'Page 1 of 104' and 'Displaying 1 - 20 of 2072'.

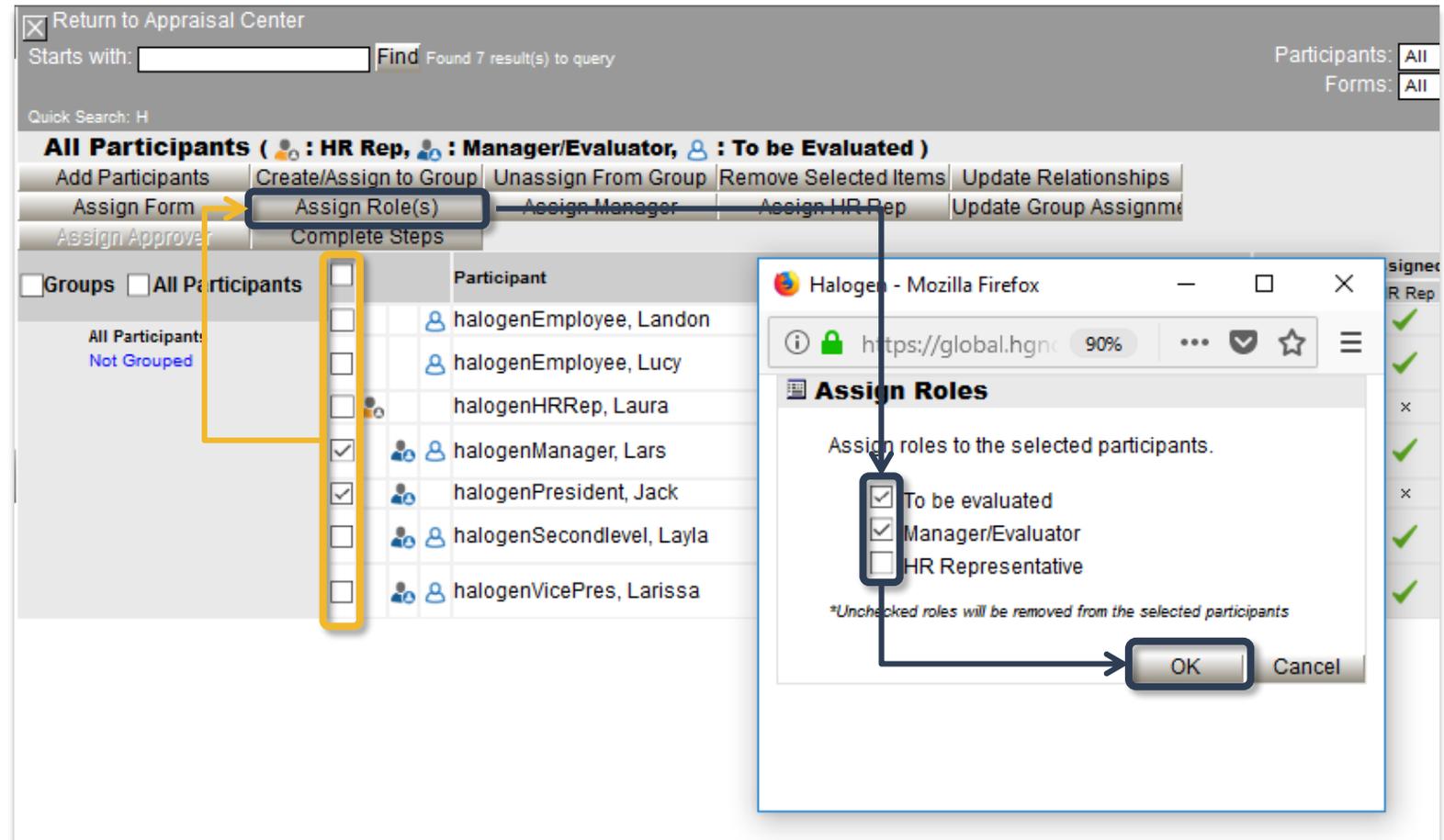


Editing Participants

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**:
 - 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.



The screenshot displays the Halogen Participant Center interface. At the top, there is a search bar with the text "Starts with: [] Find Found 7 result(s) to query". Below the search bar, there are several tabs: "All Participants", "HR Rep", "Manager/Evaluator", and "To be Evaluated". The "All Participants" tab is selected. A table lists participants with checkboxes in the first column. A yellow box highlights the checkboxes for "halogenHRRep, Laura", "halogenManager, Lars", and "halogenPresident, Jack". A blue box highlights the "Assign Role(s)" button in the top navigation bar. A dialog box titled "Assign Roles" is open, showing a list of roles with checkboxes: "To be evaluated" (checked), "Manager/Evaluator" (checked), and "HR Representative" (unchecked). A note at the bottom of the dialog states: "*Unchecked roles will be removed from the selected participants". The "OK" button is highlighted with a blue box.

Participant	Role(s)
halogenEmployee, Landon	
halogenEmployee, Lucy	
halogenHRRep, Laura	HR Representative
halogenManager, Lars	Manager/Evaluator, To be evaluated
halogenPresident, Jack	Manager/Evaluator, To be evaluated
halogenSecondlevel, Layla	
halogenVicePres, Larissa	



Editing Participants

Removing Participants

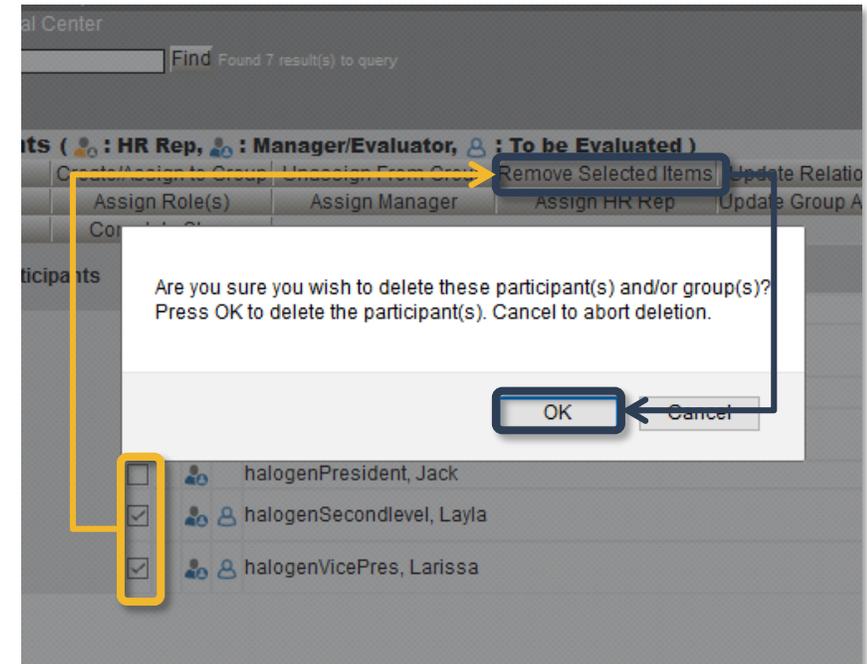
- If a participant should no longer be included in a process, they can be removed from the **Participant Center** so that their record is no longer included in reports.

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

Administratively Completing Steps for a Single Participant

- 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*

Halogen - Mozilla Firefox
https://global.hgndcloud.com/curatorsofmissouri/eAppraisal/participant/partici 90%

Individual Appraisal Status

Employee Name : halogenManager, Lars
Manager/Evaluator : halogenSecondlevel, Layla
E-Mail :
2nd-Level Manager : halogenVicePres, Larissa Change...
3rd-Level Manager : halogenPresident, Jack Change...
4th-Level Manager : Change...
HR Rep : halogenHRRep, Laura
Appraisal Form : FY18-Form 2 - SMP (SFs + optional; cmts)
Last Appraisal Completed Date : 1/26/15
Last Interim Review Date :
Employee Hire Date :
Last Promotion Date :

Prevent Updates:
checked items will not be updated from the hierarchy in the User Center - except when using the 'Update Relationships' button

Set to In Progress	Appraisal Step	Status	Completion (M/d/yy)	Person Responsible	Mark Step as Completed
<input type="radio"/>	Employee writes self-appraisal	Complete	3/2/18	halogenManager, Lars	
<input type="radio"/>	Evaluator writes employee appraisals	Complete	3/2/18	halogenSecondlevel, Layla	
	Second level evaluator reviews appraisals	Complete	3/2/18	halogenVicePres, Larissa	
	Evaluator meets and discusses appraisals with employees	Complete	3/2/18	halogenSecondlevel, Layla	
	Employee final comment and sign-off	In Progress	N/A	halogenManager, Lars	Complete
	Evaluator sign-off	Not Ready	N/A	halogenSecondlevel, Layla	
	Additional feedback	Not Ready	N/A	N/A	

Indicates additional information when placing your mouse over this icon.



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)*

The screenshot shows the 'Return to Appraisal Center' interface. At the top, there are search fields and filters for 'Participants' and 'Forms', both set to 'All'. Below this is a table of participants with columns for 'Groups', 'All Participants', and 'Participants'. A 'Complete Steps' button is highlighted in the top navigation bar. A dialog box titled 'Mark Steps Complete for Selected Participants' is open, showing two radio button options: 'Complete all steps for selected users' and 'Mark select in-progress steps complete'. The second option is selected. Below the options is a list of 'Appraisal Steps' with radio buttons next to each. The step 'Second level evaluator reviews appraisals' is selected. The 'OK' button is highlighted.



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**.

Halogen - Mozilla Firefox

https://global.hgndcloud.com/curatorsofmissouri/eAppraisal/participant/partici 90%

Individual Appraisal Status

Employee Name : halogenManager, Lars
Manager/Evaluator : halogenSecondlevel, Layla
E-Mail :
2nd-Level Manager : halogenVicePres, Larissa Change...
3rd-Level Manager : halogenPresident, Jack Change...
4th-Level Manager : Change...
HR Rep: halogenHRRRep, Laura
Appraisal Form: FY10 Form 2 - SMP (SFO - optional; emt)
Last Appraisal Completed Date: 1/26/15
Last Interim Review Date:
Employee Hire Date:
Last Promotion Date:

Prevent Updates:
checked items will not be updated from the hierarchy in the User Center - except when using the 'Update Relationships' button

Set to In Progress	Appraisal Step	Status	Completion (M/d/yy)	Person Responsible	Mark Step as Completed
<input type="radio"/>	Employee writes self-appraisal	Complete	3/2/18	halogenManager, Lars	
<input type="radio"/>	Evaluator writes employee appraisals	Complete	3/2/18	halogenSecondlevel, Layla	
<input type="radio"/>	Second level evaluator reviews appraisals	Complete	3/2/18	halogenVicePres, Larissa	
<input type="radio"/>	Evaluator meets and discusses appraisals with employees	Complete	3/2/18	halogenSecondlevel, Layla	
<input type="radio"/>	Employee final comment and sign-off	In Progress	N/A	halogenManager, Lars	Complete
<input type="radio"/>	Evaluator sign-off	Not Ready	N/A	halogenSecondlevel, Layla	
<input type="radio"/>	Additional feedback	Not Ready	N/A	N/A	

Delete Appraisal response data
 Delete Self-Appraisal response data

Rollback Status

Complete All

OK Cancel



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.

The screenshot displays the Halogen system interface. At the top, there are tabs for 'HR Rep', 'Manager/Evaluator', and 'To be Evaluated'. Below these are several action buttons: 'Create/Assign to Group', 'Unassign From Group', 'Remove Selected Items', 'Update Relationships', 'Assign Role(s)', 'Assign Manager', 'Assign HR Rep', and 'Update Group Assignme'. A yellow box highlights the 'Assign Manager' button. Below the buttons is a table with columns for 'Participants' and 'Partic'. The table contains several rows, each with a checkbox and a person icon. Three checkboxes are checked and highlighted with a yellow box. A blue arrow points from the 'Assign Manager' button to a 'Select Person' dialog box. This dialog box has a search bar with 'halogen' entered and a list of 7 results: 'halogenEmployee, Landon', 'halogenEmployee, Lucy', 'halogenHRRep, Laura', 'halogenManager, Lars' (highlighted in blue), 'halogenPresident, Jack', 'halogenSecondlevel, Layla', and 'halogenVicePres, Larissa'. A blue arrow points from the highlighted result to a 'Set as Manager >' button. Below this is an 'Assign the Person' dialog box with a 'Manager is:' field containing 'halogenManager, Lars' and a 'Clear' button. A blue arrow points from the 'Set as Manager >' button to an 'OK' button at the bottom right of the 'Assign the Person' dialog box.



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).

The screenshot illustrates the process of manually changing a second level manager in the Halogen system. The main window shows the 'Individual Appraisal Status' for an employee named Layla. The '2nd-Level Manager' field is highlighted with a 'Change...' button. A secondary window, 'Assign Approver', is open, showing a search results list with 'halogenPresident, Jack' selected. The 'Set as Approver' button is highlighted, and the 'OK' button is also highlighted. A yellow arrow points from the 'Change...' button to the 'Assign Approver' window, and another yellow arrow points from the 'Set as Approver' button to the 'Status' link in a table on the right.

Set to In Progress	Appraisal Step	Status	Comments
<input type="radio"/>	Employee writes self-appraisal	Complete	
<input type="radio"/>	Evaluator writes employee appraisals	In Progress	
<input type="radio"/>	Second level evaluator reviews appraisals	Not Ready	
<input type="radio"/>	Evaluator meets and discusses appraisals with employees	Not Ready	
<input type="radio"/>	Employee final comment and sign-off	Not Ready	
<input type="radio"/>	Evaluator sign-off	Not Ready	
<input type="radio"/>	Additional feedback	Not Ready	



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.

Status Report

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

Score Report

- Provides overall scores and detailed participant info

Customizing Reports

- 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.

The screenshot displays the 'myPerformance' interface for the 'Reports > Status Report' section. The interface includes a navigation menu with a home icon and a 'Reports' link. The main content area shows a configuration panel for the 'Status Report' with the following elements:

- Filters** and **Related Reports** tabs.
- Show:** Overall Status (dropdown menu).
- Group by:** No Grouping (dropdown menu).
- Add Filters** button.
- Task Status** dropdown menu with a list of options: Overdue, Approaching Due, In Progress, Sent for Review, Under Approval, Not Ready, and Completed.
- Step** dropdown menu with a list of options: Employee writes self-apprai..., Manager writes employee a..., Second level manager appr..., Manager meets with emplo..., Manager writes comments, Employee sign-off, and Manager sign-off.
- Process Title:** FY18 Appraisal Process.
- Status:** Active.

Annotations in the image include:

- A blue play button icon in the top left of the configuration panel.
- A blue disk icon in the top left of the configuration panel.
- A yellow arrow pointing from the 'Add Filters' button to the 'Task Status' dropdown.
- A yellow arrow pointing from the 'Task Status' dropdown to the 'Overdue' status option.
- A blue arrow pointing from the 'Overdue' status option to the 'Task Status' dropdown.

At the bottom of the interface, there is a table with columns: Step, T..., Ta..., Res..., Res..., Resp..., S. The page number is 1 of 1.



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.

