

2014

Agency Tier 1 Support Document



Tier 1 Support Document

Tier 1 support issues include questions related to ePerformance ELM courses and the basic operations of creating and maintaining ePerformance documents. Many Human Resources staff members in your agency have been trained in the system and can help you troubleshoot ePerformance issues.

If you need additional information, there are job aids for the ePerformance ELM courses as well as many ePerformance functions available at: <http://das.ohio.gov/ePerfToolkit>.

Manager (Rater) Issues

Name Changes When Creating a Performance Document

When a user attempts to create a performance document, the system may change his or her name to another user's name and prevent the document from being created. This error may occur if the PC in use is shared. In this instance, the myOhio.gov login reverts back to the previous user when attempting to create a performance document. To remedy this, ensure that the web browser you are using is set up to automatically clear temporary files/cookies each time the web browser window is closed.

There are several Job Aids, including one about MyOhio Internet options and web browser settings, available at: <http://das.ohio.gov/ePerfToolkit>.

Accepting a Nomination for an Evaluation Request

When a manager nominates an employee into an evaluation process, that employee must accept the nomination before they can access the document. To accept a nomination, log in to myOhio.gov. Click [Career Resources](#) and navigate to [ePerformance Other Documents](#) under the [Manager Tasks](#) heading. From this screen, select [Pending Evaluation Requests](#) under the [Other's Performance Documents](#) heading and accept the nomination. Once the nominee has accepted the nomination, both the Manager (Rater) and the ePerformance HR Administrator will be able to see that the nominee has accepted the nomination and also when the nomination document has been completed.

Issues with Nomination Requests

If an employee is unable to accept a nomination request, consider the **Reports To** structures of all involved. A Manager (Rater) cannot create a nomination request for the evaluation of an employee who does not currently report to him or her. Consider the following scenario: A Manager (Rater) was promoted to a new position on September 1, 2012. In creating a performance document to evaluate an employee who previously reported to her, the Manager (Rater) entered an **As Of Date** (July 1, 2012 as shown below) that is prior to her September 1 promotion.



Create Performance Documents

Employee Selection Criteria
Select the employees you are creating new performance documents for.

Employee Reporting as of 07/01/2014

While this Manager (Rater) *will* be able to create a performance document for the employee, the performance document *will not be fully functional*. To create a fully functional document, the employee's *current* Manager (Rater) must create the document, and then nominate both the previous Manager (Rater) and intended nominee.

ePerformance Course Enrollment

If an employee has alerted you that he/she did not get a notification for ELM course enrollment, there are a few items to consider:

- Is the employee who didn't get the notification a State employee or a contractor? Non-State employees such as contractors were not included in the original mass enrollment process.
- Did the notification go to the employee's spam or junk e-mail folder (if your agency has spam or junk folders in place)?
- Did the employee delete the notification in error? See the next bullet.
- Employees and Manager (Rater)s can check to see what courses they've been enrolled in without referring to the mass enrollment notification message. They should log in to myOhio.gov, click **Career Resources**, then navigate to **All Learning (ELM)** for a current list of enrollments.

Editing Employee Evaluation Criteria

Once a Manager (Rater) **Saves** an employee's evaluation criteria, it becomes available for the employee to view. The ePerformance tool will allow Manager (Rater)s to make changes to the employee's evaluation criteria or add new criteria throughout the year, as long as they continue to **Save** the changes. Once the Manager (Rater) clicks the **Complete** button they can no longer make changes to the criteria. Managers (Rater)s should not click the **Complete** button until they are ready to begin the performance evaluation rating process.

Once the evaluation criteria portion of a performance document is marked as **Complete**, the action cannot be reversed. The document must be **Cancelled** and a new document created. However, it is possible to **Clone** the document before you **Cancel** it so the shell of the original evaluation is available to reference.

Cannot Access Employee ePerformance Documents

Check to see if the employee has moved within the agency. If the employee was promoted or otherwise moved and that action impacted the **Reports To** structure, the employee's ePerformance role was likely changed. If a Manager (Rater) no longer has the same employees reporting to him/her, he/she will need to consult with HR to move the applicable employees' documents to their new Manager (Rater). ePerformance security roles are assigned based on the **Reports To** structure within OAKS, so a Manager (Rater) can no longer access the documents that he/she previously had access to.

Manager (Rater)s should make sure documents are marked as **Complete** prior to the change in OAKS; or, if the documents are not completed by the time the change is effective, the documents can be **Transferred** to another Manager (Rater). Additionally, if the employee is still in the agency, he/she could be **Nominated** back into the process to provide comments/input.

How are Due Dates on the Document Details page calculated?

Document Progress			
Step		Status	Due Date
Establish Evaluation Criteria	<input checked="" type="checkbox"/>	Completed	05/15/2012
Nominate Participants	<input checked="" type="checkbox"/>	Completed	02/14/2013
Track Nominations	<input type="checkbox"/>	Not Started	02/14/2013
Review Participant Evaluations	<input type="checkbox"/>	Not Started	02/14/2013
Review Self Evaluation	<input checked="" type="checkbox"/>	Cancelled	02/14/2013
Review Manager Evaluation	<input checked="" type="checkbox"/>	Completed	03/01/2013

- **Establish Criteria:** 305 days before period end date
- **Nominate Participants, Track Nominations, Review Participant Evaluations:** 30 days before period end date
- **Review Manager Evaluation:** 15 days before period end date

ELM Course-Specific Issues

Course Freezing / Locking Up

It could be that the temporary files/cookies in your web browser need to be cleared or you may need to use a different web browser if you are using an older version of Internet Explorer. Try to launch the course from a different web browser (e.g., Google Chrome or Mozilla Firefox).

There are several job aids, including one about MyOhio internet options and browser settings, available at: <http://das.ohio.gov/ePerfToolkit>.

Course Freezing / Locking Up During a Quiz

The quickest way to remedy this is to re-launch the quiz. Close and reopen your web browser, then go to myOhio.gov and log back in. Click *Career Resources* and navigate to *All Learning (ELM)*. Find the particular course you are having trouble with and click the link to access it. This should take you to a screen where all of the lessons in the course are displayed, including the quiz. Click *Launch* or *Re-Launch* next to the quiz, depending on which option is displayed. If you launch the quiz from the beginning, you will be taken to the first screen of the quiz. If you are re-launching the quiz, it should take you back to the point where you left off.

Be sure to click **Submit** each time you answer an individual question; this is how the quiz retains your answers. If you click **Next** or the arrow to advance to the next question without first clicking **Submit**, your answer from the previous question will not be properly recorded. After answering a question, there will be a slight delay before a message pops up that says **Correct** or **Incorrect**. If **Correct**, the message, **Click anywhere to continue** will also appear. Move your mouse anywhere on the screen and click once. There may be a slight delay but you will automatically move to the next question.

If you continue to have trouble after following the aforementioned steps, try re-launching the quiz altogether by clicking the  icon in the upper left corner on the menu bar. This will start the quiz over again.

Table of Contents / Closing a Lesson

The Table of Contents in each ELM-based ePerformance course is designed as a lesson itself. When you get to the last page of the Table of Contents, you'll see a message in the lower right on the screen that says **Click the 'X' in the menu bar to exit**. Click the 'X' once on the menu bar near the upper left corner of your screen. There may be a slight delay but the Table of Contents will close and you will be returned to the **View Progress** page. Click **Return to Activity Progress** to go back to the list of lessons in the course. These steps apply to closing any ELM lesson.

Advancing Through a Lesson / Completing a Lesson

You may find that by clicking the forward/next button on the menu bar in an ePerformance ELM course, you are able to advance through the lessons in a course. However, in order for ELM to recognize that you have completed a lesson, you will need to click the **Continue** button whenever it appears along the lower right of your screen when you're in a lesson. Sometimes it takes the **Continue** button a few seconds to pop up. Clicking the forward/next button will allow you to advance through a lesson, but your progress isn't recorded.

When you get to the quiz in a course, be sure to click **Submit** each time you answer an individual question; this is how the quiz records your answers. If you click on the word **Next** or the arrow to advance to the next question without first clicking **Submit**, your answer from the previous question will not be recorded. After answering a question, there will be a slight delay before a message pops up that says **Correct** or **Incorrect**. If **Correct**, the message, **Click anywhere to continue** will also appear. Move your mouse anywhere on the screen and click once. There may be a slight delay but you will automatically move to the next question.

Incomplete Lesson / Course Navigation

To remedy this, you will need to re-launch the course. Log in to myOhio.gov, click **Career Resources** and navigate to **All Learning (ELM)**. Find the particular course you are having trouble with and click the link to access it. This will take you to a screen where all of the lessons in the course are displayed. Select **Re-Launch** next to the specific lesson that is incomplete and a new page will open to the point in the lesson where you left off. Once back in the lesson, click the  button on the menu bar (top left on the screen in the course). This resets/restarts the lesson from the beginning.

Using the proper navigation buttons in the course and in the quiz is critical. You will find that by clicking the forward/next button on the menu bar, you are able to advance through the lessons in a course. However, in order for ELM to recognize that you have completed a lesson, you will need to click the **Continue** button whenever it appears along the lower right of your screen when you're in a lesson. Sometimes it takes the **Continue** button a few seconds to pop up.

Additionally, there are several other “automatic” navigation paths ePerformance courses will have you follow. For example, there will be places where you are asked to **Click to scroll down to...** or **Double click in the box**. Those areas will always be surrounded by a red border or line. Although the lesson may appear to display an actual evaluation page, only the specified navigation is programmed in. To navigate through these portions of the lessons, simply follow the directions that appear on the screen.

Unable to Launch

This issue can usually be resolved by changing the restrictions on pop-up blocker settings on your web browser and/or ensuring the computer has the most recent updates from Adobe installed. The ePerformance ELM courses were created with a program called *Captivate* and may not load or work properly if the latest versions of Adobe products are not installed on your individual computer. Please check with your agency's I.T. staff if you need further assistance with the settings on your computer.

There are several job aids, including one about MyOhio internet options and browser settings, available at: <http://das.ohio.gov/ePerfToolkit>.

After verifying the settings mentioned above, log in to myOhio.gov. Click **Career Resources** and navigate to **All Learning (ELM)**. Find the particular course with which you are having trouble and click it. This will take you to a screen where all of the lessons in the course are displayed. Click **Launch** or **Re-Launch** next to the lesson, depending on which word is there. If you launch the lesson from the beginning, you will be taken to the first screen of the lesson. If you are re-launching the lesson, it should take you back to the point where you left off.