OhioDAS Human Resources Division | OAKS

2013

Agency Tier 1 Support Document

Revised:

9/27/2013

Tier 1 Support Document

Tier 1 support issues involve any basic operational questions. These include issues relating to ePerformance ELM courses and the basic operations of creating and maintaining ePerformance documents. Your human resources staff can be of assistance to you as we have been working with human resources staff in all state agencies and many of them have already completed the ePerformance courses.

If you need additional information, there are job aids for the ePerformance ELM courses and basic ePerformance functions available at:
http://das.ohio.gov/Divisions/HumanResources/TalentManagement/PerformanceManagement/Eperftoolkit.aspx

Supervisor/Manager-Specific 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 browser is set up to automatically clear cache each time the browser window is closed.

There are some job aids, including one about browser settings, available at:
http://das.ohio.gov/Divisions/HumanResources/TalentManagement/PerformanceManagement/Eperftoolkit.aspx

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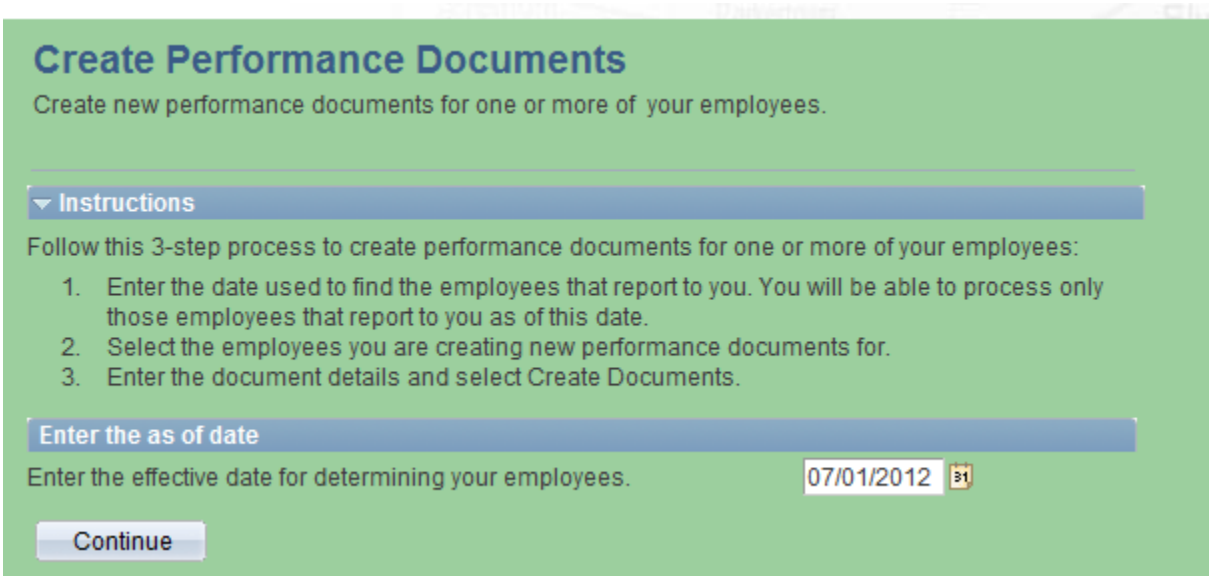
Accepting a Nomination for an Evaluation Request

In the case that 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, go to myOhio.gov and log in. Click on ***"Career Resources"*** and navigate down 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 HR Admin will be able to see whether 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 supervisor cannot nominate an employee for the evaluation of another employee who does not currently report to that supervisor. Consider the instance of a supervisor's promotion. The supervisor 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 supervisor entered an ***"As Of Date"*** (July 1, 2012 as shown below) that is prior to her September 1 promotion.



The supervisor *will* be able to create a performance document for the employee, but the performance document ***will not be fully functional***. To properly create the document, the employee's ***current supervisor*** must create the document, and then nominate both the previous supervisor and intended nominee to provide the employee's evaluation.

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ePerformance Course Enrollment

If an employee has alerted you that he/she did not get a notification for ELM course enrollment, there are some things 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 mass enrollment process.

- Did the notification go to the employee's spam e-mail box, if your agency has spam boxes in place?
- Did the employee delete the notification in error? See the next bullet.
- Employees and supervisors can check to see what courses they've been enrolled in and they don't need the mass enrollment notification message to do so. They should navigate to myOhio.gov and log in. Click on ***"Career Resources,"*** then navigate down to ***"All Learning (ELM)."***

Editing Employee Evaluation Criteria

Once a supervisor/manager ***"Saves"*** an employee's evaluation criteria it becomes available for the employee to view. The ePerformance tool will allow supervisors and managers 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 supervisor/manager selected the ***"Complete"*** button they can no longer make changes to the criteria. It is recommended that supervisors and managers do not select the ***"Complete"*** button until they are ready to begin the rating process of the performance evaluation.

Once the document has been marked as ***"Completed,"*** the action cannot be reversed. The document will have to be ***"Cancelled"*** and a new document created. However, it is possible to ***"Clone"*** this 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 promoted or otherwise moved and that impacted the ***Reports To*** structure, the employee's ePerformance role was likely changed. Once the employee moved and no longer has the same employees reporting to them that they created documents for, they will no longer be able to access evaluation documents created in the previous position. The roles are assigned based on the ***Reports To*** structure within OAKS, so a supervisor/manager can no longer access the screens that he or she previously had access to over those specific positions.

Options are to make sure the documents are completed prior to the change in OAKS or if the documents are not completed by the time the change is effective in OAKS, the documents can be ***Transferred*** to another supervisor. Additionally, if the employee is still in the agency, s/he could be ***Nominated*** back into the process to provide comments/input.

Due Dates on the Document Details page, how are they calculated for annual evaluations?

Document Progress			
Step		Status	Due Date
Establish Evaluation Criteria	✔	Completed	05/15/2012
Nominate Participants	✔	Completed	02/14/2013
Track Nominations	○	Not Started	02/14/2013
Review Participant Evaluations	○	Not Started	02/14/2013
Review Self Evaluation	✖	Cancelled	02/14/2013
Review Manager Evaluation	✔	Completed	03/01/2013

Establish Criteria: 305 days before period end date

Nominate Participants: 30 days before period end date

Manager Evaluation: 15 days before period end date

ELM Course-Specific Issues

Course Freezing / Locking Up During a Quiz

The quickest way to remedy this is to re-launch the quiz. Close and re-load your browser, then go to myOhio.gov and log back in. Click on ***"Career Resources"*** and navigate down to ***"All Learning (ELM)."*** Find the particular course you are having trouble with and click on 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 word is there. If ELM has 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 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 retained. 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 on the little circular arrow in the upper left corner on the menu bar. This will start the quiz over again.

Course Freezing / Locking Up

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

There are some job aids, including one about browser settings, available at: http://das.ohio.gov/Divisions/HumanResources/TalentManagement/PerformanceManagement/Eperftoolkit.aspx

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Table of Contents / Closing a Lesson

The Table of Contents in each ePerformance course in ELM 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 retains 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 retained. 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. Go to myOhio.gov and log back in, then click on ***"Career Resources"*** and navigate down to ***"All Learning (ELM)."*** Find the particular course you are having trouble with and click on 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 on the little button on the menu bar (top left on the screen in the course) that has a circle with an arrow on it. That resets/restarts the lesson from the beginning.

Using the proper navigation buttons in the course and in the quiz at the end 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 the 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 an internet browser and/or ensuring the computer has the most recent updates from Adobe installed. The ePerformance ELM courses were created with Captivate and may not load or work properly if the latest versions of Adobe products are not available on your computer. Please check with your I.T. staff if you need further assistance with the settings on your computer.

There are some job aids, including one about browser settings, available at: http://das.ohio.gov/Divisions/HumanResources/TalentManagement/PerformanceManagement/Eperftoolkit.aspx

After verifying the settings mentioned above, go to myOhio.gov and log back in. Then click on ***"Career Resources"*** and navigate down to ***"All Learning (ELM)"*** and click on it. Find the particular course you are having trouble with and click on 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

ELM has you launch the lesson from the beginning, you will be taken to the first screen of the lesson. If you're re-launching the lesson, it should take you back to the point where you left off.