ePerformance Document Approval Process

MANAGER (RATER)
MANAGER (REVIEWER)
ePERFORMANCE ADMINISTRATOR

Revised:
6/13/2017
ePerformance Document Approvals

Once all evaluation criteria have been rated and saved, an ePerformance document must be sent through the approval chain. When Manager (Rater)s create performance evaluation documents, they have three template choices currently available in ePerformance (Standard, Modified and Executive) that will dictate who approves the document. Depending on the template used, the approval process will vary slightly.

Approval Templates

The Standard template is useful for agencies with a traditional, hierarchical reporting structure. Because of this, it is used by most agencies most of the time. It is available for Annual, Probationary, and Ad Hoc reviews. The approval chain progresses as follows:

1. Manager (Rater) clicks the Submit for Approval button
2. Manager (Reviewer) reviews the document and approves or denies the evaluation
3. ePerformance Administrator reviews the document and approves or denies the evaluation
4. Designated Appointing Authority* reviews the document and approves or denies the evaluation

*Appointing Authority is an optional level of approval. Agencies must submit a completed Appointing Authority Designation Form to ePerformance@das.ohio.gov prior to including this level.

Standard Template

Start: (All criteria have been rated) → Manager (Rater) clicks Submit for Approval button → Manager (Reviewer) reviews document and comments → Document Approved? YES → HR Admin reviews document → Document Approved? YES → *Appointing Authority reviews document → Document Approved? YES → Manager (Rater) marks document Available for Review → Manager (Rater) sends document back to Manager (Rater) → *Optional level of approval

*Optional level of approval
Approval Process: Manager (Rater) Role

Once all evaluation criteria have been rated and saved, an ePerformance document must be sent through the approval chain.

1. Manager (Rater) navigates to: myOhio > Career Resources > Manager Tasks > ePerformance Performance Docs > Current Documents.

2. Click the Document Type hyperlink for the applicable employee.

3. Click the Submit for Approval button.

4. Click the Submit button.
The Manager (Rater)’s evaluation has now been submitted to the Manager (Reviewer) for approval. Notice that the Complete Manager Evaluation Status displays In Progress.
Approval Process: Manager (Reviewer) Role

Once the Manager (Rater) submits the evaluation for approval, the Manager (Reviewer) is now able to access the performance evaluation. The Manager (Reviewer) accesses the document from MyOhio.gov. Begin by navigating to the “Select Transaction to Approve” page. The page will contain a list of employees’ documents which require approval by the Manager (Reviewer).

1. Manager (Reviewer) navigates to: myOhio > Career Resources > Manager Tasks > ePerformance Document Approval.

2. Click the Employee Name link. The Approve Transaction page will open.

3. For the Manager (Reviewer) to view the actual evaluation, he/she will need to access the Performance Document Details. Click the Performance Document Details link to do so.
4. Click the **Expand All** link located above Section 1.

5. The Manager (Reviewer) cannot change the ratings that the Manager (Rater) recorded, but he/she can make comments. These comments can be seen by both the approval chain and the employee.

6. Click the **Return to Performance Document Approval** link in order to return to the Evaluation Approval Chain screen.
Notice that in the Evaluation Approval Chain the status is Pending.

Beneath the Pending box, another Comments box exists. The Manager (Reviewer) can enter any necessary comments *for other approvers’ view*. Clicking the Approve button will route the performance evaluation to the next level of approval. The Deny button will return the performance evaluation to the Manager (Rater).

7. Click the Approve button.
8. After clicking the **Approve** button, a confirmation page will appear. Click the **OK** button.

![Approve Transaction]

9. The Evaluation Approval Chain now displays a status of *Approved* for the Manager (Reviewer) and the status for the next level of required approval is *Pending*.

![Evaluation Approval Chain]

10. In the Standard template, the next approver is the HR Administrator role.
Approval Process: ePerformance Administrator Role

Once the Manager (Reviewer) has approved the evaluation, the ePerformance Administrator is now able to access the performance evaluation. The ePerformance Administrator accesses the document from MyOhio.gov’s Human Capital Management (HCM) Application. Begin by launching the HCM Application.

1. ePerformance Administrator navigates to: myOhio > Launch HCM > Main Menu > Workforce Development > Performance Management > Approve Documents. The page will contain a list of employees’ documents which require approval by the ePerformance Administrator.

2. Click the Employee Name link. The Approve Transaction page will open.

![Select Transaction to Approve](image-url)
3. For the ePerformance Administrator to view the actual evaluation, he/she will need to access the Performance Document Details. Click the Performance Document Details link to do so.

4. Click the Expand All link located above Section 1.
5. The ePerformance Administrator cannot change the ratings that the Manager (Rater) recorded, but he/she can make comments. These comments can be seen by both the approval chain and the employee.

Section 13 - APPOINTING AUTHORITY COMMENTS

Thank you for you contributions.

6. Click the Return to Performance Document Approval link in order to return to the Evaluation Approval Chain screen.
Notice that in the Evaluation Approval Chain the status is *Pending*.

Beneath the Pending box, another Comments box exists. The ePerformance Administrator can enter any necessary comments *for other approvers’ view*. Clicking the *Approve* button will route the performance evaluation to the next level of approval, if added. The *Deny* button will return the performance evaluation to the Manager (Rater).

7. Click the *Approve* button.
8. After clicking the **Approve** button, a confirmation page will appear. Click the **OK** button.

![Approve Transaction](image)

9. The Evaluation Approval Chain now displays a status of *Approved* for both the Manager (Reviewer) and the ePerformance Administrator. If added, the status for the Appointing Authority level of approval is *Pending*.

![Evaluation Approval Chain](image)

**NOTE:** Ad Hoc Approvers, usually appointing authorities, must navigate to *myOhio > Launch HCM > Main Menu > Workforce Development > Performance Management > Approve Documents* to access the documents that need approval.
Alternate Approval Templates
The Modified template is useful for agencies with a less hierarchical reporting structure, such as a board, commission, or very small agency. It is available for Annual, Probationary, and Ad Hoc Reviews. The approval chain progresses as follows:

### Modified Approval Template

1. Manager (Rater) clicks the **Submit for Approval** button
2. ePerformance Administrator reviews the document and approves or denies the evaluation
3. Designated Appointing Authority* reviews the document and approves or denies the evaluation

*Appointing Authority is an optional level of approval. Agencies must submit a completed Appointing Authority Designation form to [ePerformance@das.ohio.gov](mailto:ePerformance@das.ohio.gov) prior to including this level.

### Modified Approval Template Flowchart

![Flowchart of the Modified Approval Template](image)

*Optional level of approval*
The Executive-level template is useful for the direct reports of agency Directors. It is available for Annual and Ad Hoc reviews. There is no approval chain used with this template:

**Executive-Level Approval Template**

![Manager/ Rater]

**Executive-Level Approval Template Flowchart**

![Flowchart Diagram]

Start: (All criteria have been rated) → Manager (Rater) marks the document Available for Review