

2016

ePerformance Document Approval Process

MANAGER (RATER)

MANAGER (REVIEWER)



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:

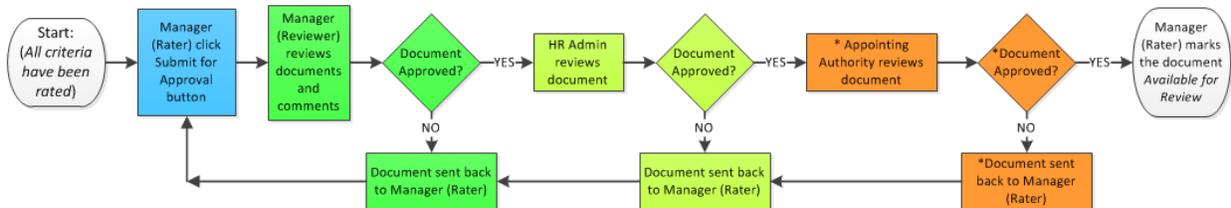
1. Manager (Rater) clicks the **Submit for Approval** button
2. Manager (Reviewer) reviews the document and approves or denies the evaluation
3. ePerformance Administrator reviews the document and approves or denies the evaluation
4. Designated Appointing Authority* reviews the document and approves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



Standard Template Flowchart



*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.

✓ You have successfully saved your evaluation.
Enter ratings and comments for each section in this evaluation, if applicable. Save entries made on the evaluation by selecting the Save button.

Save **Submit for Approval** [Return to Document Detail](#)

4. Click the **Submit** button.

Performance Document - PROBATIONARY REVIEW

Submit for Approval

You have chosen to submit this performance evaluation for approval. To confirm that you would like to submit the evaluation for approval, select the Submit button.

Do not submit this evaluation until you have completed each section. Once you select Submit, the evaluation will be routed through the approval process to the appropriate individuals. You will then be notified through email on the approval status.

Submit Cancel

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*.

Current Performance Documents

Document Details

DIEDRE Ferris, Customer Service Assistant 1
 PROBATIONARY REVIEW: 07/01/2012 - 12/31/2012

You have successfully submitted your evaluation.

Performance Document Details

Employee:	DIEDRE Ferris	Job Title:	Customer Service Assistant 1
Document Type:	PROBATIONARY REVIEW	Period:	07/01/2012 - 12/31/2012
Template:	PROBATION PERFORMANCE REVIEW	Document ID:	740
Manager:	LISA Baker	Status:	In Progress

Document Progress

Step	Status	Due Date	Action
Establish Evaluation Criteria	✔ Completed	03/01/2012	View
Nominate Participants	🟡 In Progress	12/01/2012	Edit
Track Nominations	ⓘ Not Started	12/01/2012	
Review Participant Evaluations	ⓘ Not Started	12/01/2012	
Review Self Evaluation	ⓘ Not Started	12/01/2012	
Complete Manager Evaluation	🟡 In Progress	12/16/2012	Edit

[Return to Select Documents](#)

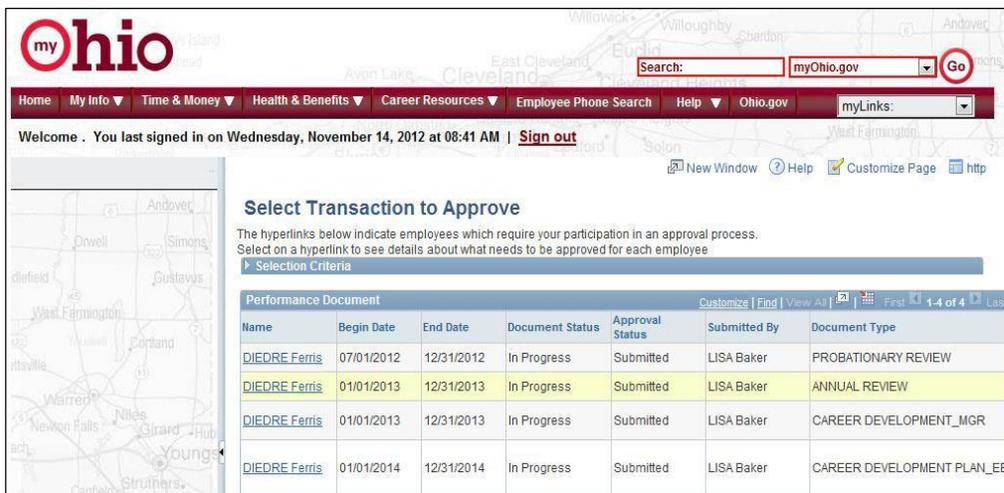
Approval Process: Manager (Reviewer) Role

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.](#)

NOTE: Ad Hoc Approvers, usually appointing authorities, must navigate to [myOhio > Launch HCM > Main Menu > Workforce Development > Performance Management > Approve Documents](#) in order to access the documents that need approval.

2. Click the [Employee Name](#) link. The Approve Transaction page will open.



- In order 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.

Approve Transaction
Approve or deny the proposed information for the employee listed below. You may also enter optional comments about each approval choice. When you are finished, select the Approve or Deny button at the bottom of the page.

DIEDRE Ferris Empl ID: 10038136

Performance Document

Doc Type: PROBATIONARY REVIEW
Author: LISA Baker
Period Begin Date: 07/01/2012 Period End Date: 12/31/2012

Rating:
[Performance Document Details](#)

Process Detail

Name	Role Name	Process Action	Process Action Date
LISA Baker	Originator	Submit	11/14/2012

Evaluation Approval Chain

:Pending Request Information

Evaluation Approval Chain

```

graph LR
    A["Pending  
10061048  
ePerformance Approving Mgr"] --> B["Not Routed  
Multiple Approvers  
ePerformance HR Administrator"]
  
```

- Click the [Expand All](#) link located above Section 1.

[Expand All](#) [Collapse All](#) [Expand Sections](#)

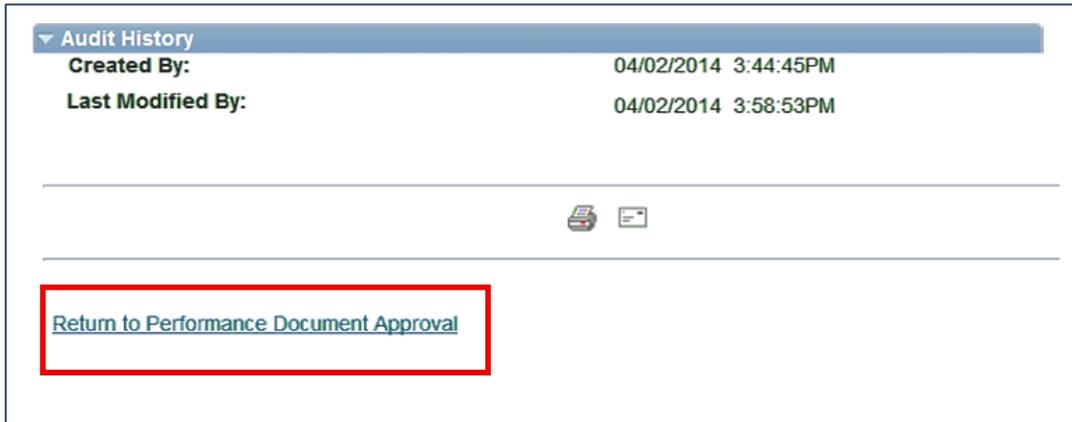
▼ **Section 1 - PURPOSE OF ORGANIZATION & POSITION**

- 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.

▼ **Section 12 - MANAGER REVIEWER COMMENTS SECTION**

Diedre is an asset to the team. Keep up the good work.

- 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).

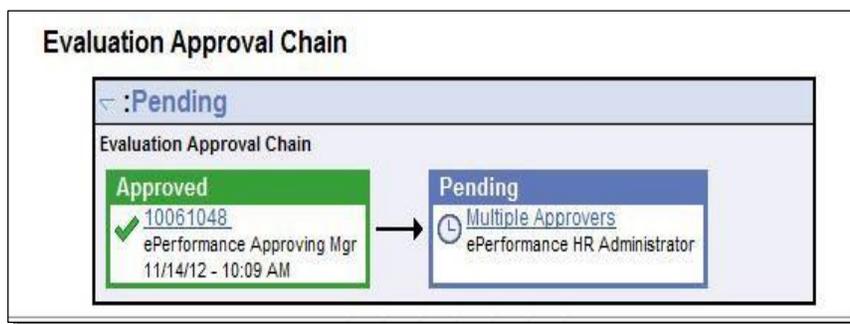
- Click the **Approve** button.



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



- 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*.



- In the Standard template, the next approver is the HR Administrator role.

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:

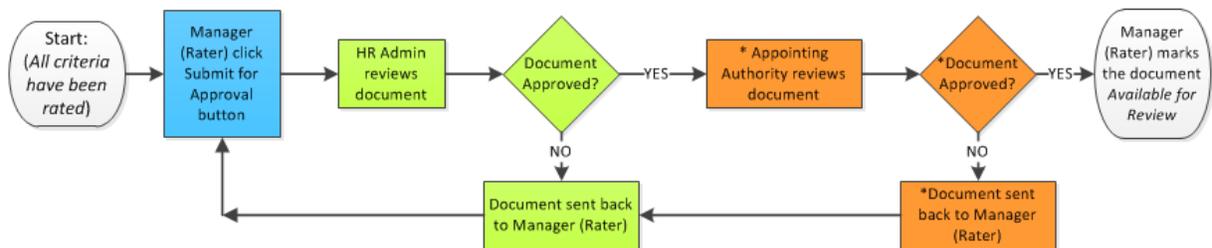
Modified Approval Template



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 prior to including this level.

Modified Approval Template Flowchart



*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



Executive-Level Approval Template Flowchart

