

# 2016

## Third Party Nomination

MANAGER (Rater)



## Third Party Nomination

During the review of a performance or development document, a Manager (Rater) may want another Supervisor’s feedback on the Employee’s performance. A Manager (Rater) can achieve this through the nomination process. This Third Party Nomination process allows the Manager (Rater) to request outside input on the Employee’s performance, while still being able to supply his or her input. The Manager (Rater) requesting the nomination is still responsible for conducting the face-to-face performance evaluation with the employee.

**NOTE:** Before nominating other people to participate in a performance review document, the Establish Evaluation Criteria step must be marked Complete.

### Nominating a Participant

1. Manager (Rater) Navigates to: [myOhio > Career Resources > Manager Tasks > ePerformance Performance Documents > Current Documents](#).
2. Click the [Document Type](#) hyperlink for the applicable employee.

Performance Documents						
Employee	Document Type	Begin Date	End Date	Job Title	Status	
DIEDRE Ferris	<a href="#">ANNUAL REVIEW</a>	11/12/2012	12/31/2012	Customer Service Assistant 1	In Progress	

3. Click the [Start](#) hyperlink next to the *Nominate Participants* step on the *Document Details* page.

Document Progress					
Step	Status	Due Date	Action	Next Action	
Establish Evaluation Criteria	✓ Completed	01/29/2013	<a href="#">View</a>		
Nominate Participants	○ Not Started	10/31/2013		<a href="#">Start</a>	

- Click the [Add Nominator](#) hyperlink.

### Nominate Participants

DIEDRE Ferris, Customer Service Assistant 1  
ANNUAL REVIEW: 11/12/2012 - 12/31/2012

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◆ **Participant Role: Nominator** Required: 0 Maximum:5

**Nominations**

Currently there are no nominees in your nomination list.

[Add Nominator](#)

- Using the *Search Criteria* fields, enter the name of the nominating person and click the **Search** button.

**NOTE:** Only employees who are **Exempt** from collective bargaining can be nominated. The Manager (Rater) should not nominate the Manager (Reviewer) as a Third Party. The Manager (Reviewer) is part of the approval workflow and will later have the opportunity to review and approve the ratings provided by the Manager (Rater).

### Person Search - Simple

Nominate Participants

▶ **Instructions**

**Search Criteria**

**Name:**

**Last Name:**

**First Name:**

**ACName:**

- In the *Search Results*, click in the checkbox next to the participant to be nominated. Continue this process until all Exempt employees from whom you would like feedback are included as nominated parties (ePerformance allows a maximum of 5 nominations per document.)

### Person Search - Simple

Nominate Participants

▶ Instructions

Search Criteria

**Name:**

**Last Name:**

**First Name:**

**ACName:**

Search Results

<input checked="" type="checkbox"/>	JANELLE Smith	
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- Click the **OK** button.

**NOTE:** To view additional information about nominated participant, click the  icon next to his or her name. The resulting information is illustrated below:

### Person Search - Simple

Details for JANELLE Smith

Data

**Description:** Employee

Data

**Type:** EMP Active

**Department:** TAX210300 Audit-South Central Region

**Location:** TAXTEL Telecommuting Employee

[Return to List](#)

- Click the **Save and Submit** button.

### Nominate Participants

DIEDRE Ferris, Customer Service Assistant 1  
 ANNUAL REVIEW: 11/12/2012 - 12/31/2012

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★ You have selected nominations for addition. The nominations will be added when the transaction is saved.

◆ Participant Role: Nominator Required: 0 Maximum:5

Nominations	
Nominee	Action
JANELLE Smith	

[+ Add Nominator](#)

**NOTE:** On the Nominate Participants page, another participant can be nominated by clicking the [Add Nominator](#) link and following the previous steps.

- On the *Document Details* page, a confirmation can be seen indicating that the nominations were submitted successfully.

**Current Performance Documents**

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### Document Details

DIEDRE Ferris, Customer Service Assistant 1  
 ANNUAL REVIEW: 11/12/2012 - 12/31/2012

**You have successfully submitted your nominations.**

- On the *Document Details*, page Click the *Edit* link next to the *Track Nominations* step to check the status of your nominated participant’s review.

### Viewing Third Party Participant Input

Once a Third Party Participant has marked his or her ratings and comments Completed, the Manager (Rater) can view the information and choose to incorporate it into their own ratings.

1. Manager (Rater) navigates to the employee’s current performance document. On the *Document Details* page, click the [View](#) link next to the *Review Participant Evaluations* step.

Document Progress				
Step	Status	Due Date	Action	Next Action
Establish Evaluation Criteria	✓ Completed	11/29/2013	<a href="#">View</a>	
Nominate Participants	🕒 In Progress	08/31/2014	<a href="#">Edit</a>	
Track Nominations	🕒 In Progress	08/31/2014	<a href="#">Edit</a>	
Review Participant Evaluations	🕒 In Progress	08/31/2014	<a href="#">View</a>	
Review Self Evaluation	⊖ Not Started	08/31/2014		
Complete Manager Evaluation	⊖ Not Started	09/15/2014		<a href="#">Start</a>

[Return to Select Documents](#)

2. Click the linked participant name to access the nominated party’s evaluation document.

Participant Evaluations			
Participant	Role	Status	Due Date
<a href="#">PARTICIPANT NAME</a>	Nominator	Completed	11/01/2015

[Return to Select Documents](#)

3. Click the [Expand All](#) link to review all document sections. The Manager (Rater) is not able to change any ratings or comments.



4. Click the [Return to Document Detail](#) link at the bottom of the page once all available Third Party Participant documents have been reviewed.



### Incorporating Third Party Participant Input

The Manager (Rater) can now proceed with rating the employee. Incorporating the Third Party Participant(s) input is optional. If the Manager (Rater) chooses to do so, he or she is able to select comments made by the participant(s) and pull them into each section's Comment box.

1. Click the **Start** link next to the Complete Manager Evaluation step to begin.

Document Progress					
Step		Status	Due Date	Action	Next Action
Establish Evaluation Criteria	<input checked="" type="checkbox"/>	Completed	11/29/2013	<a href="#">View</a>	
Nominate Participants	<input checked="" type="checkbox"/>	In Progress	08/31/2014	<a href="#">Edit</a>	
Track Nominations	<input checked="" type="checkbox"/>	In Progress	08/31/2014	<a href="#">Edit</a>	
Review Participant Evaluations	<input checked="" type="checkbox"/>	In Progress	08/31/2014	<a href="#">View</a>	
Review Self Evaluation	<input type="checkbox"/>	Not Started	08/31/2014		
Complete Manager Evaluation	<input type="checkbox"/>	Not Started	09/15/2014		<a href="#">Start</a>

[Return to Select Documents](#)

2. Note that no rating choices are pre-selected based upon the Third Party Participant(s) ratings. If the Manager (Rater) wishes to include the participants' comments within the Comments box, he or she may do so by clicking the **Writing Tools** link next to a chosen Comments box.

1. Does Not Meet
  2. Meets Expectations
  3. Exceeds Expectations

Rating: 2. Meets Expectations 

Comments: [Writing Tools](#) 

- Select the comment(s) from the available Suggested Results Text list, then click the **Add to Comments** button.

**Performance Document - ANNUAL REVIEW**  
**Writing Tools - Suggested Results**

Suggested Results	
Suggested Results Text	Source
<input type="checkbox"/> Strong focus on customer relationships and external contacts.	PARTICIPANT NAME

Select All Deselect All

**Add to Comments**

Comments:

Save and Return Cancel Find Additional Content:  Go

- Note that the chosen comments are now incorporated into the Comments box. Finally, click the **Save and Return** button.

**Performance Document - ANNUAL REVIEW**  
**Writing Tools - Suggested Results**

Suggested Results	
Suggested Results Text	Source
<input type="checkbox"/> Strong focus on customer relationships and external contacts.	PARTICIPANT NAME

Select All Deselect All

Add to Comments

Comments:

Strong focus on customer relationships and external contacts.

**Save and Return** Cancel Find Additional Content:  Go



- The comments are now displayed within the appropriate Comments box, but they are not distinguished from the Manager (Rater) comments. If a distinction is necessary, the Manager (Rater) should indicate that the inserted comment is from a nominated participant, and then add any additional comments labeled as shown below.

**CUSTOMER FOCUS**

**Description :** Customer Focus is required for use in all state of Ohio performance evaluations. The Customer Focus competency centers on the employee interaction with the customer. It can be either an internal or external customer. It must be demonstrated that the employee understands the need(s) of the customer. The demonstration should include the employee level of knowledge, the tone and the timeliness of the employee responses. The employee should know when to seek assistance to ensure the customer has an overall positive experience. Finally, the evaluation should include examples that the employee evaluates his/her practices based on customer feedback.

[+ Select Job Level](#)

1. Does Not Meet  2. Meets Expectations  3. Exceeds Expectations

**Rating:** 2. Meets Expectations

**Comments:**

[Writing Tools](#)

**Nominated Participant Comment:** Strong focus on customer relationships and external contacts.

**Manager (Rater) Comment:** Employee is meeting customer service expectations by continuing to assist customers with invoice and billing questions.

- Continue steps 2 through 5 immediately above for any Comments boxes.
- When finished, click the **Save** button to retain any work for future editing, or the **Submit for Approval** button to proceed through the approval process.

[Return to Document Detail](#)