

2016

ePerformance Overview



Revised:

6/17/2016

ePerformance Overview

ePerformance is the statewide tool that is used to create and manage Performance Evaluations (Probationary, Annual, and Ad hoc), Performance Improvement Plans (PIPs), and Career Development Plans (CDPs). ePerformance is accessed using myOhio.gov. PIPs and CDPs are grouped collectively as Development Documents. Links found within ePerformance function the same way as other links within myOhio; however, they have their own navigation menu.

NOTE: At the beginning of the performance evaluation period, Manager (Rater)s and employees should meet to discuss the employee's competencies, goals and performance expectations for the upcoming evaluation period. At the completion of the meeting, the Manager (Rater) will then add the performance criteria into the system. At the end of the performance review period, the Manager (Rater) will then rate how well the employee met the expectations using the State's standardized rating models. The Manager (Rater) will then conduct a face-to-face meeting with the employee to review the evaluation, allowing the employee to provide his/her input before ending the evaluation period. As you can see, the overall performance management process itself has not changed, only the tool used to perform the associated tasks.

The following sections will show you how to navigate the system, find specific documents, and provide some helpful hints for working within ePerformance.

Getting Started

Logging In

To view a performance or development document, you begin by logging into myOhio.

1. Navigate to **myOhio**: <https://myohio.oaks.ohio.gov>.
2. Log in by entering your **myOhio UserID** and **Password**.



3. Click the **Sign In** button.
4. You will arrive at your **myOhio** homepage.

NOTE: Based upon your security access in myOhio, your homepage may look different.

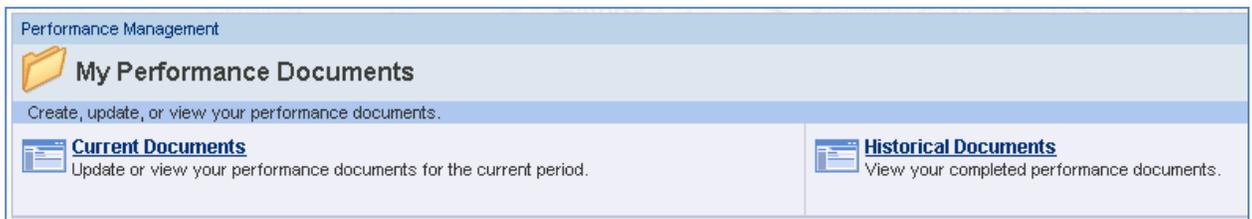


Employee Navigation

Employee Performance Evaluation

To view **Probationary**, **Annual**, or **Ad hoc** Performance documents, the navigation is the same. Employees have view only access; only supervisors and managers can modify the document.

1. Navigate to your performance review: [myOhio > Career Resources > My Performance Documents](#).
2. On the **My Performance Documents** page, you can choose to view [Current Documents](#) or [Historical Documents](#) by clicking the associated hyperlinks.



Employee Development Documents

To view or modify **Career Development Plans** or **Performance Improvement Plans**, the navigation is the same.

1. Navigate to your development documents: [myOhio > Career Resources > My Development Documents](#).
2. On the **My Development Documents** page, you can choose to [Create Documents](#), or view/modify [Current Documents](#) or [Historical Documents](#) by clicking the associated hyperlinks.



NOTE: Historical documents created prior to ePerformance’s implementation will not be available electronically. Documents completed moving forward will become historical documents.

Manager (Rater) Navigation

Manager (Rater) - Performance Evaluation Documents

To create, view, or modify **Probationary**, **Annual**, or **Ad hoc** Performance documents, the navigation is the same. Administrative tasks, such as canceling a document, are also available. The Manager (Rater) will only have access to documents of direct reports, transferred documents, and documents the Manager (Rater) has been nominated to evaluate. They can also view the evaluation documents of their employees' direct reports using the [View-Only Documents](#) link.

1. Navigate to the employee's performance review: [myOhio > Career Resources > Manager Tasks > ePerformance Performance Documents](#).
2. On the **Performance Documents** page, you can choose to view/modify [Current Documents](#) or [Historical Documents](#), [Create Documents](#), [View Only Documents](#) and perform certain [Administrative Tasks](#) by clicking the associated hyperlinks.



Manager (Rater) - Development Documents

To create, view or modify **Career Development Plans** or **Performance Improvement Plans**, the navigation is the same except instead of Performance documents, Manager (Rater)s navigate to Development documents. Certain Administrative Tasks, such as canceling a document, are available also. The Manager (Rater) will only have access to documents of direct reports and transferred documents. They can also view the evaluation documents of their employees' direct reports using the [View-Only Documents](#) link.

1. Navigate to the employee's performance review: [myOhio > Career Resources > Manager Tasks > ePerformance Development Documents](#).

- On the **Development Documents** page, you can choose to view/modify **Current Documents** or **Historical Documents**, **Create Documents**, **View Only Documents** and perform **Administrative Tasks** by clicking the associated hyperlinks.



NOTE: Historical documents created prior to ePerformance’s implementation will not be available electronically. Documents completed moving forward will become historical documents.

Finding a Document

Choosing a Document

Sometimes an employee or Manager (Rater) will find him/herself creating, viewing, or modifying different types of performance or development documents at the same time. The following shows a way to help make sure the document selected is the intended document.

- Look at the **Document Type** column. From here, you can tell what type the document is.

Development Documents							
Document Type	Begin Date	End Date	Job Title	Status	Mentor		
CAREER DEVELOPMENT MGR	11/01/2012	12/31/2013	Customer Service Assistant 1	In Progress	LISA Baker		
PERFORMANCE IMPROVEMENT PLAN	10/01/2012	12/31/2012	Customer Service Assistant 1	In Progress	LISA Baker		

- Look at the **Begin Date** and **End Date**. This is the time period that has been assigned to complete the processes. The dates in the illustration are assigned to a Career Development Plan and a Performance Improvement Plan.

Development Documents						
Document Type	Begin Date	End Date	Job Title	Status	Manager	
CAREER DEVELOPMENT MGR	11/01/2012	12/31/2013	Customer Service Assistant 1	In Progress	LISA Baker	
PERFORMANCE IMPROVEMENT PLAN	10/01/2012	12/31/2012	Customer Service Assistant 1	In Progress	LISA Baker	

- Use the **Job Title** column to identify employees who have held multiple jobs. Here you can identify what job is associated with the document.

Development Documents						
Document Type	Begin Date	End Date	Job Title	Status	Manager	
CAREER DEVELOPMENT MGR	11/01/2012	12/31/2013	Customer Service Assistant 1	In Progress	LISA Baker	
PERFORMANCE IMPROVEMENT PLAN	10/01/2012	12/31/2012	Customer Service Assistant 1	In Progress	LISA Baker	

- Use the **Status** column to identify the status of the associated document.

Development Documents						
Document Type	Begin Date	End Date	Job Title	Status	Manager	
CAREER DEVELOPMENT MGR	11/01/2012	12/31/2013	Customer Service Assistant 1	In Progress	LISA Baker	
PERFORMANCE IMPROVEMENT PLAN	10/01/2012	12/31/2012	Customer Service Assistant 1	In Progress	LISA Baker	

- Use the **Manager** column to identify who created the document.

Development Documents						
Document Type	Begin Date	End Date	Job Title	Status	Manager	
CAREER DEVELOPMENT MGR	11/01/2012	12/31/2013	Customer Service Assistant 1	In Progress	LISA Baker	
PERFORMANCE IMPROVEMENT PLAN	10/01/2012	12/31/2012	Customer Service Assistant 1	In Progress	LISA Baker	

Understanding the Status of your Documents

To understand where you are in the process, use the **Performance Document Details** page. Every step will have an associated Status. Monitoring the Status is very helpful when tracking progress of your documents.

1. Notice that each **Step** has an associated **Status**. There are three statuses available for the steps: Not Started, In Progress, and Completed, as illustrated below.

Performance Document Details				
Employee:	DIEDRE Ferris	Job Title:	Customer Service Assistant 1	
Document Type:	ANNUAL REVIEW	Period:	11/13/2012 - 11/14/2012	
Template:	ANNUAL PERFORMANCE REVIEW	Document ID:	730	
Manager:	LISA Baker	Status:	In Progress	
Document Progress				
Step	Status	Due Date	Action	Next Action
Establish Evaluation Criteria	✓ Completed	01/14/2012	View	
Complete Self Evaluation	○ Not Started	10/15/2012		Start
Review Manager Evaluation	🔄 In Progress	10/30/2012		