ePerformance Agency Readiness

Guide and Checklist

Last Updated: January 31, 2013

NOTE: The date above is the most recent version.

Table of Contents

1. EPERFORMANCE READINESS CHECKLIST

SYSTEM

- ☐ Communicate to agency employees about the new system/tool for performance management (Task 5)
- ☐ Identify up to 2 Annual Cycle Start Dates for exempt (non-bargaining) employees (Task 6)
- ☐ Review and Establish "Reports To" Structure
- ☐ Establish ePerformance Roles for ePerformance System Administrator and Appointing Authority (Task 11)
- ☐ Review and update "Probation Date" Field

PROCESS

- ☐ Establish and Communicate Purpose of Organization Statement
- ☐ Confirm or Draft Purpose of Position Statements
- ☐ Communicate the Statewide Competency – Customer Focus

TRAINING

- ☐ Identify ePerformance Train-the-Trainers for both technical (system) and non-technical (non-system / soft skill) course content (Task 8)
- ☐ Determine How to Manage Your Training Program (Identify Training lead, Schedule, Course Content, etc.)
- ☐ Communicate and Execute Your Agency's Training Program
- ☐ Leverage ELM Mass Enrollment until/if agency has a plan for agency specific training execution

- ☐ Be prepared to receive further communication on Competency Training
- ☐ Be prepared for additional communication for Business Intelligence (BI) Training

POLICY

- ☐ Create and Communicate Agency Policy for Performance Improvement Plan (PIP) Documents to include: Criteria for use of Career Development Documents
- ☐ Criteria for use and review of Performance Improvements Plan Documents
- ☐ Agency Expectations of Reviewing Performance Evaluations
- ☐ Determine Use of Agency and/or Classification Level Competencies
- ☐ Be prepared for additional communication for Performance Evaluation Policy Training

USER SUPPORT

- ☐ Identify who will generate reports and when
- ☐ Determine and Communicate Agency ePerformance User Support
- ☐ Distribute ePerformance Contact Sheet to Staff
- ☐ Be prepared for additional communication for Business Intelligence (BI) Training

2. OVERVIEW

The purpose of this guide is to consolidate information into one place to prepare your agency as we move to implement ePerformance, the new tool available, as of January 28th, which will facilitate the performance evaluation process.

The business drivers for implementing ePerformance include:

- Streamline the performance management process via electronic workflow; where employees have e-mails in OAKS they will receive automatic notifications in advance of evaluations being due. Where employees do not have a work email in OAKS, the role of the ePerformance Human Resources (HR) System Administrator position(s) will continue to put employees, both staff and supervisors alike, on notice to review.
- Provide a mechanism for standardized reporting and improved reporting capabilities; Two (2) reports will be delivered with the implementation of the system. HRD is also working with the OAKS Business Intelligence (BI) group to establish additional reports.
- Incorporate advisor tools for supervisors to use that will make it easier to complete employee evaluations.
    - To be implemented at the initial Go-Live:
        - Competency catalog
        - Spell check
        - Language checker
        - Capability to attach documents (e.g., training certificates, awards, etc.)
    - To be implemented later:
        - Competency anchors/results writer tool and development tips
        - Goal catalog (position, project, development related)
        - Updated website to support agencies, supervisors and employees

In the short-term, implementing this tool provides a base-line for the State to capture, monitor, review and analyze performance data. The intent over the long-term is to work with agencies to explore additional functionality and become more sophisticated.

The information provided on the following pages will help guide your agency to be ready to help your employees make the transition to the new tool and lead to mastery in the performance management process described below.

Capability	Basic	Progressive	Mastery
Goal Development	• Job descriptions used as reference points • Objectives not checked for business alignment • Annual objective setting and progress reviews	• Job descriptions are updated and align with business goals • **Employees are guided to line up objectives with specified agency goals**, **with partial cascade** • Annual and mid-year review based on SMART objectives	• Business goals fully integrated with performance management and used to deliver specific change • Strategy hardwired to objectives and SMART goals managed to completion
Competency Management	• Competencies used but no defined proficiency levels, or not utilized	• **Competencies and proficiency levels** are used; emphasis in evaluating both outcomes (results) and inputs (behaviors)	• Competencies serve as the "glue" to unite job level & family
Performance Evaluation	• Explicit standards with unrealistic use of ratings, i.e. all in middle or too high • No or minimal employee input	• Poor performance addressed with **normal-curve type ratings distribution** • Manager's input supplemented with other feedback and employee input	• Segmentation based on performance, competencies & value of business contribution; effective management of ratings distribution • Clear links to career paths & mobility
Automation & Integration	• Paper-based process and/or online process applications are piecemeal	• **Online HR applications with some connections**, usually via competencies	• Online applications fully integrated
Governance & Audit	• No process evaluation, revised on as needed basis • No standard audit and quality control procedures, reviewed on as needed basis with no standardized criteria	• Process reviewed at agreed periods • **Standard audit and quality control** procedures established with standardized criteria	• Leading practice researched and infused regularly • Continuous process improvement

◇ = Current state
★ = Desired future state

Note: Leading practice data obtained from Accenture benchmark studies

What is Changing and What is Not Changing?

The Ohio Performance Review System (OPRS) and the set of paper performance evaluations will begin to be phased out with the HCM 9.1 Upgrade. ePerformance is a Statewide tool that will utilize the current OAKS self-service functionality. Once logged into OAKS, through myOhio.gov, an electronic workflow is generated and allows advance notification when evaluations are due and/or when the document is modified in order to keep all parties informed and on the same page regarding performance expectations. Use of the new tool also acts as a mechanism for standardized reporting and trending.

In conjunction with the implementation of ePerformance a competency catalog has been pre-loaded and made available to agencies.

> There is one (1) Statewide competency assigned to all positions, however, at go-live agencies will have a choice to adopt agency and/or classification level competencies. Stay tuned for more when the policy is released.
>
> Finally, agencies have selected between 1 or 2 Annual Performance Management Cycle Start Dates for exempt (non-bargaining) employees and that information has been populated in the system.

The Performance Management Cycle is the periodic review and evaluation of an individual's job performance which supports the performance management process of maintaining or improving employee job performance through the use of an evaluation document, continuous monitoring, coaching, and providing on-going feedback.

The overall concept and process for performance management is NOT changing. Please reference Task 6, Select a Performance Management Cycle for additional detail on Performance Management Cycles.

IMPORTANT NOTE: Based on current Administrative Guidelines and Union contracts in place, only the Exempt employee classifications can be placed in an annual performance cycle. **However, please notify DAS in your cycle selection response, if your Agency already has a specific agreement or MOU in place allowing bargaining unit staff to all begin on one (1) annual evaluation cycle date and attach the agreement.**

Frequently Asked Questions

How will the Anniversary Date vs. Annual Cycle for step date activation work?

- Steps will continue according to code/contract as it is today, on step/anniversary date.

How will exempt employees be 'assigned' a Performance Management Cycle for ePerformance? Is it at the Division, Department or employee level?

- Task 6 requested the Agency level. However, the Agency can drive it down to the division, department and/or employee level. However each Agency will need to provide us with a spreadsheet that identifies cycle start periods, along with individual Employee ID's to be 'assigned' to that cycle start period. Reference Task 6 for additional clarifying information at myOhio.gov.

How will evaluation dates be determined? Will employees need an evaluation at the new date if they have already had an evaluation within the year based on our existing review schedule? Will there be an initial grace period for employees?

- There will be a transition period for both the implementation of ePerformance and at the end of probation as exempt employees move to the annual performance cycle.

- The parameters are not yet finalized for the length of time required before syncing up with the annual performance evaluation cycle(s) (e.g. 9-15 months). More information to follow.

Will agencies have the option to change their selected cycle post implementation in the event the cycle(s) selected are not the most appropriate fit with our business needs?

- Yes. A process will be made available. More information to follow.

Will agencies have the option to add an additional cycle should we determine one cycle is not enough time to manage exempt performance evaluations?

- Yes. The Agency can have up to 2 cycles for exempt employees at this time. A process will be made available.

How are probationary evaluations going to be performed?

- The process of probationary evaluations will remain the same, however, the documentation will be completed using the ePerformance system. The probationary evaluation is 1 of 3 templates to select in the system.

Is the review for exempts (still receiving their steps if not stepped out) done at the annual performance cycle chosen by the Agency, and not affect any money at this time?

- At the current time, there is not a direct tie between the review cycle and an employee's step cycle date. The employee will continue to receive their step, if eligible, on the step/anniversary date unless the step is to be denied. Further Policy guidance will be provided at a later date around step denial.

How are contract specific evaluation dates identified in OAKS?

- Contract specific evaluation dates are linked to the salary plan. If the agency would like more information, contact the DAS-HRD Applications and Reporting Team (ART) for further discussion.

There is a probation date in Job Data under the Employment tab, which is incorrect for many employees. How is that field corrected? Will that date drive the evaluation process?

- The probation date in Job Data under the Employment tab will drive the bargaining unit employee annual evaluation date. The DAS-HRD Applications and Reporting Team (ART) will be running report queries on the probation date field and will contact agencies with blank or incorrect fields directly.

When will "submission" of performance evaluations begin with ePerformance?

- ePerformance will begin to be used at go-live, January 28th . Agencies have an opportunity to begin converting current, in-progress paper evaluations into OAKS/ePerformance as soon as ePerformance is implemented regardless of being a bargaining unit or non-bargaining unit employee. At this time, there is no deadline for beginning use of the new tool. DAS will be monitoring the usage,

3. SYSTEM

CURRENT PERFORMANCE EVALUATION PROCESS

In using the OPRS tool, the Human Resources staff sends an e-mail to the employee's immediate supervisor notifying them to begin the paper evaluation process. The supervisor then completes the evaluation on paper and forwards it on to his/her immediate manager for review and first level of approval. Once that is complete, it is then sent back to the Human Resources staff for the second level of approval, and finally onto the Appointing Authority for the third or final level of approval. The evaluation is then returned to the immediate supervisor to conduct the in person evaluation review and meeting with the employee. At the completion of the performance evaluation review the employee will acknowledge the review by providing their signature. The completed paperwork is then filed appropriately by HR.

INCORPORATING SYSTEM WORKFLOW IN TO PERFORMANCE EVALUATION PROCESS

In the current process there is a lot of paperwork being manually passed around from person to person via interoffice mail or e-mail attachments. In the new system manual processing will be eliminated. The information will be created, monitored and retained in the ePerformance system and viewed only by those who have been assigned role-specific security access.

In the new system, instead of the Human Resources staff sending out the initial notifications, the new workflow feature will automatically notify the immediate supervisor when to complete steps in the process. The supervisor will then complete the evaluation electronically within the system. It will be routed through the approval process using workflow based on a combination of OAKS data for Reports To structures and assigned role-specific security access. Each level of approval will require an electronic signature. After the approval process is completed, the supervisor can then print out a copy of the evaluation to review with the employee, or it will be available for the employee to view online. The employee will acknowledge the performance evaluation with an electronic signature or they can physically print and scan to reattach to the system. There is no need to forward the evaluation to the Human Resources Department since it is already stored in the appropriate location, and accessible through their security setup.

Agencies should pay close attention to the approval process. You may require more or less, levels of approval than mentioned earlier. The system has been setup to accommodate these differences.

For example, it is suggested agencies setup the system to accommodate a three-level over review: Immediate Supervisor (rater), Manager (reviewer) and HR System Administrator (approver – as designated by the Appointing Authority). However, when a fourth signature is required, using the ad-hoc feature will allow the HR System Administrator to still forward the final review to the Appointing Authority for direct approval. Additionally, for agencies that seek input from another supervisor (i.e., Nominate) or for those agencies using Self-Evaluation as part of the overall process, a specific training class and job aid are being developed.

If your agency's evaluation process differs from the process described above it is recommended that you develop a workflow outline specific to your agency to address the differences.

Provide Overview to Agency Staff

Once you have reviewed the Performance Management Evaluation process with your Agency, please answer the following three questions:

- Is there any part of the evaluation process that your Agency does differently? If yes, please explain.
- Do managers within your Agency share the responsibility of evaluating the same employee? This is known as Third Party Input.
- Does your current Agency's performance evaluation process include the employee self-evaluation component? If yes, will you continue to use it in ePerformance? If no, are you planning on incorporating it into your process using ePerformance?

See Task 5 in Appendix A for more information.

Determine Agency Annual Cycle Start Dates for Exempt (non-bargaining) Employees

Based on current Administrative Guidelines and Union contracts in place, only the Exempt employee classifications can be placed in an annual performance cycle. However, please notify DAS in your cycle selection response, if your Agency already has a specific agreement or MOU in place allowing bargaining unit staff to all begin on one (1) annual evaluation cycle date and attach the agreement .

See Task 6 in Appendix A for more information.

Review and establish "Reports to" relationships:

Establishing an accurate "Reports to" structure is key in a successful roll-out of the ePerformance system to your agency. Please pay particular attention to this task to ensure these relationships are correct.

The following are items to keep in mind when reviewing and establishing "Reports to" relationships:

- Do the relationships accurately portray supervisor/subordinate relationships for rater and employee roles?
- Do the relationships accurately portray supervisor/manager relationships for rater and reviewer roles?

Establish ePerformance roles:

- The roles are as follows:
  - Employee: Performance document is created to inform the employee of performance expectations; employees will also acknowledge a performance meeting is held in the review and approval process.

- Supervisor / Manager (Rater): The immediate supervisor will create and set the performance expectations for staff and subsequently will rate the employee(s) on their performance.
- Manger (Reviewer): The manager for the supervisor will conduct a review to assure consistency between performance notes and ratings.
- ePerformance System Administrator: Conducts a second line review for consistency in performance notes and ratings, use of non-discriminatory language, etc.
- Appointing Authority: Final approver in the review/approval process. In some instances, an agency may designate this role to the ePerformance System Administrator.

The agency must determine and submit to DAS the roles for ePerformance System Administrator and/or Appointing Authority (see Task 11 in Appendix A). More information will be made available about documenting and designating the appointing authority role to the ePerformance Administrator.

The table below identifies current state performance evaluation user roles and cross references them to the appropriate ePerformance Learning Group and Recommended Learning Path.

Cross Reference Table

Current User Role	ePerformance Learning Group
Employee	Employee
Immediate Supervisor (Rater)	Supervisor / Manager
Manager (Reviewer)	Supervisor / Manager
HR System Administrator (known as ePerformance System Administrator in the ePerformance module (2nd level reviewer or Final approver with Appointing Authority Designation)	ePerformance System Administrator
Appointing Authority(Final Approver)	Supervisor / Manager

Review and Update Probation Date fields for Bargaining unit Employees

The probation date in Job Data under the Employment tab will drive the bargaining unit employee annual evaluation date. The DAS-HRD Applications and Reporting Team (ART) will be running report queries on the probation date field and will contact agencies with blank or incorrect fields directly.

The Probation Date field that will be used to prompt notifications within the agency for ePerformance after go-live currently has many blank fields. The blank fields are mostly due to the legacy system not carrying the data over into this specific field with the transition to OAKS. Also, because these employees have had no other movement in their position since then, it is still blank. Finally, note that these blank fields are only for bargaining unit (union) employees. All non-bargaining (exempt) employees are on newly assigned cycle start dates and will be located in the Professional Experience Date field.

Following go-live the Probation Date field will populate from the Grade Entry Date field (as promoted, demoted) and/or may require manual entry (as reassigned).

In preparation for ePerformance go-live, the DAS, HRD Applications and Reporting team (ART) ran a query of the blanks fields and we have attached it for your use per the steps below:

1. Please contact oakshcm.upgrade@oaks.state.oh.us to view the spreadsheet and locate your agencies worksheet (worksheets are sorted alphabetically by 3 character acronym).
2. Review to determine how the agency would like to work with DAS, HRD to update the fields
    - Where there are *more than 20 employees* -
        a) Suggestion A: 1-by-1 determine the date to enter; agency discussion and identification through historical records and/or special rules; note the dates on the worksheet in column H the ART team can use the spreadsheet to populate for you
        b) Suggestion B: Use the Grade Entry date/field; note the choice in column G the ART team can run the query and populate for you
        c) Suggestion C: If the agency has another method by which to determine the date to enter in this field, please also craft that response to forward for consideration and feasibility.
    - Where there are *20 or fewer employees* -
        a) Please enter the dates directly in the system. Simply navigate to Employment Data and enter the date. You do not need to add a row.
3. Complete this review or update the fields by January 18th, close of business.

Please submit information once complete and/or questions to OAKSHCM.Upgrade@oaks.state.oh.us.

Frequently Asked Questions

How many approval levels are there?

- There are either 3 or 4 approval levels depending on Agency practice.
    - Rater -> Reviewer -> HR System Admin. In this instance the Appointing Authority approval is delegated to the HR System Admin, though the signature process will continue to show 4 levels on the signature screen/page.
    - Rater -> Reviewer -> HR System Admin and Appointing Authority. In this instance Appointing Authority approval is not delegated.

Does the protocol for ePerformance require the supervisor to meet with staff member(s) being evaluated to discuss the content of the evaluation before the signed document is handed to them?

- Yes. As it is today, the supervisor will have 30 days before and after the due date to meet with staff member(s) to discuss the content of the evaluation.

Does the person being evaluated have the right to attach clarifying information to the evaluation document?

- No, at this time only the supervisor and ePerformance System Administrator can attach documents at various points in the process.

How can the employee being evaluated confirm that clarifying information has been attached in an evaluation?

- The employee being evaluated can go in and 'view' the attachment once an attachment is uploaded.

Will non-state supervisors have access to the ePerformance system?

- Yes. This is dependent on the contingent worker enhancement currently being developed and tested.

Will there be a notification sent out 30 days before evaluations are due right after system goes live?

- First notifications will be sent as soon as the system goes live, as long as the evaluations in question are 60 or 30 days out, depending on the type of evaluation. Annual evaluations will receive a 60-day advance notice and probationary reviews 30-days advance notice.

Who will be monitoring the ePerformance mailbox for the notifications for the employees reporting to vacant positions? How will the HR Admins be notified?

- Whoever has the "reports to" PN for the position will get the notifications. If the field is blank it will kickback to a 'system' inbox which will be monitored by DAS. DAS will contact agencies to work on a solution to assure the document is tracked until such time as the "report to" is a populated field again.

If we find that a probationary date is incorrect, is there a job aid that tells the HR person what to do?

- See pages 10-11 above.

4. PROCESS

PURPOSE OF ORGANIZATION STATEMENT:

The Purpose of Organization Statement is the statement of your agency's vision values, mission and/or goals and objectives. This statement is a required input in ePerformance and starts the cascading effect for the employee to understand the overall purpose of the agency and how their work fits in to the organization's vision.

- Identify or create your agency's vision, values, mission and/or goals and objectives statement.
- For the purpose of the ePerformance template:
    - What, how and when will your agency provide supervisors and raters this information?
        - Suggestion: Use the agency business or strategic plan to pull the information from.
        - Suggestion: create a Word document to share or make available on an intra-net for supervisors to obtain this information.

PURPOSE OF POSITION STATEMENTS:

The Purpose of Position Statement links the overall purpose of the agency to the employee's position in order to identify how their position fits in to the overall organization.

- Identify who is responsible for the drafting of the Purpose of Position statement
    - Will the supervisor be responsible or HR or both?
    - Does your agency want all statements to match for the most commonly used classifications?
        - Suggestion: At go-live consider using the current classification concept for each classification title used in your agency? This will help with consistency.

STATEWIDE COMPETENCY- CUSTOMER FOCUS:

It is important to remember that Customer Focus will be the only populated Statewide Competency item and must be rated. This decision is based on ORC 121.91 (A).

Customer Focus is required for use in all state of Ohio performance evaluations. The Customer Focus competency centers on the employee's 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's level of knowledge, the tone and the timeliness of the employee's 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.

- Has your agency already addressed the ORC language related to state government employee's obligations for providing quality customer service?
    - In position descriptions?
- How will your agency communicate expectations around the new "customer focus" competency?
    - Is communication required prior to the launch of ePerformance technical training?

AGENCY AND CLASSIFICATION COMPETENCIES:

The competency catalog has been pre-loaded into ePerformance by DAS HRD Office of Workforce Administration. The terms and definitions are available for assignment. However, the behavioral anchors are being finalized. Use the standard Rating Models A and B as benchmarks to guide expectations until the anchors are uploaded.

Please reference Appendix D – Statewide Competency Catalog containing the competency terms and definitions for application in the Agency and/or Classification sections of the performance evaluation.

Frequently Asked Questions

How do goals tie into the competencies?

- Goals and competencies are not tied together. Goals and competencies stand alone as sections on the evaluation. Competencies are designed to reflect the behaviors in how an employee completes their goals (i.e., the combination of using knowledge, skills and abilities). Completed goals reflect the actual business outcomes achieved by the employee.

PERFORMANCE EXPECTATIONS:

Performance expectations are performance standards that are based on the position, not the individual that emphasize observable, specific indicators for success on the job. Performance expectations are regular and routine job duties with fixed expectations for quantity, quality, timeliness and outcomes.

- Suggestion: Items to use in determining performance expectations:
  - The classification specification
  - Up-to-date position descriptions
  - Standard operating procedures, from which performance expectations may be drawn

GOALS & OBJECTIVES:

Goals and objectives are connected to an agency, division or institution's strategic planning where an individual performer aligns their work outcomes and creates independent/supervisor approved work plans that details action steps necessary to accomplish position level goals. Goals and objectives are an option for most team leaders, supervisors, managers and/or administrators with responsibility for directing people and/or programs.

Suggestion: Items to consider in determining goals and objectives.

- Do strategic planning or business plan documents exist, from which goals and objectives may be drawn?
- Project documentation that outline fixed expectations
- Training required to maintain agency accreditation, certification, etc.

Frequently Asked Questions

Where are goals (SMART goals) entered in the system?

- Within the performance document, there is a section called Goals & Performance Expectations to place specific goals and expectations. The manager will be able to add goals and performance expectations based on the identified employee's position responsibilities and agency goals and business objectives.

RATING SYSTEMS:

There is a three (3) point system for rating competencies, performance expectations and/or goals & objectives and a five (5) point system for the overall performance review.

3-point rating model A and anchor defintions

Does Not Meet	Fails to meet standards (e.g., employees with this rating fail to satisfactorily perform most aspects of the position, perrformance levels are below established requirements for the job, employee requires close guidance and direction in order to complete routine assignments).
Meets Expectations	Fully meets standards (e.g., achieves acceptable standards of peformance, expectations and requirements, results can be expected which are timely and accurate, performance constitues what is expected of a qualified, experienced employee performing in this position).
Exceeds Expectations	Exceeds standards (e.g., consistently goes above the communicated expectations of the job responsbility or goal, demonstrates a unique understanding of work beyond assigned area of responsbility, achievements are obvious to subordinates, peers, managers and customers).

5-point rating model B and anchor defintions

Does Not Meet	Fails to meet standards (e.g., employees with this rating fail to satisfactorily perform most aspects of the position, perrformance levels are below established requirements for the job, employee requires close guidance and direction in order to complete routine assignments).
Needs Improvement	Ususally meets standards (e.g., generally meets expectations required for the position, one or more areas are consistenly weak and will require improvement, employee requires coaching to obtain results that are

	timely and accurate).
Meets Expectations	Fully meets standards (e.g., achieves acceptable standards of peformance, expectations and requirements, results can be expected which are timely and accurate, performance constitues what is expected of a qualified, experienced employee performing in this position).
Exceeds Expectations	Exceeds standards (e.g., consistently goes above the communicated expectations of the job responsbility or goal, demonstrates a unique understanding of work beyond assigned area of responsbility, achievements are obvious to subordinates, peers, managers and customers).
Outstanding	Fully exceeds standards (e.g., performance is noticeably superior, performance demonstrates exceptioonal iniative to plan and anticipate problems and employee takes appropriate action independently to resolve, performance requires little to no supervision to produce exemplary results).

Frequently Asked Questions

Are goals and the Statewide Competency, "Customer Focus" the only items to initially be reviewed in the system?

- The Statewide Competency of "Customer Focus" as well as Goals and Performance Expectations will be the “required” performance criteria elements to be initially reviewed in the system. In addition, the option to include both Agency-specific and Classification-specific competencies from the pre-defined competency catalog is available.

When HR and supervisors are transferring paper goals/objectives into the system starting in January, will they be transferring old evaluations?

- Historical evaluations will not be transferred into the new ePerformance system.

Transfer of documents – when will the system allow you to transfer the document?

- Documents that are transferred will no longer be available to the original supervisor or manager. The receiving manager will be the one responsible for completing the evaluation process. To include more than one supervisor/manager (rater) in the same evaluation, the 3rd party nomination process should be utilized. System admins can transfer documents; 3rd party nominations are performed by the supervisor/manager (rater).

5. TRAINING

Identifying what courses an employee should take is a three step process. The three steps are:

1. Identify employee's appropriate ePerformance Learning Group. Start by identifying the employee's current user role. Then, using the cross reference table listed above, identify the employee's ePerformance Learning Group. An employee should only belong to one learning group. For example: even though a manager is also an employee, the manager only needs to belong to the Supervisor / Manager Learning Group because training as an employee has been included as part of the recommended Supervisor / Manager Learning Path.

2. Assign the employee to the appropriate Learning Path.
   Use the same cross reference table listed above to identify the employee's Learning Path. Learning Paths contain all the training courses that are being developed to support State ePerformance users. Learning Paths are explained in further detail in the next subsection.

3. Determine the appropriate courses for the employee to attend. Once you have identified the appropriate Learning Path, you are now able to identify the appropriate training courses. Employees are not required to attend all courses listed on the Learning Path. However, at a minimum, employees should attend courses designated as "Core".

Cross Reference Table

Current User Role	ePerformance Learning Group	Recommended Learning Path
Employee	Employee	Recommended Employee Learning Path
Immediate Supervisor (Rater)	Supervisor / Manager	Recommended Supervisor / Manager Learning Path
Manager (Reviewer)	Supervisor / Manager	Recommended Supervisor / Manager Learning Path
HR System Admin. (known as ePerformance System Administrator in the ePerformance module (2nd level reviewer or Final approver with Appointing Authority Designation)	ePerformance System Administrator	Recommended ePerformance System Administrator Learning Path
Appointing Authority(Final Approver)	Supervisor / Manager	Recommended Supervisor / Manager Learning Path

COURSE DELIVERY METHODS

A blended methodology is being used to deploy ePerformance training. Train-the-Trainer, Instructor-led, and Online / eLearning (or Self-Study) is all being used as part of the blended methodology. The table below identifies the training deployment method and provides a brief description of each method.

ePerformance Deployment Methods and Description

Deployment Method	Deployment Description
Train-the-Trainer (TTT)	TTT sessions are designed to equip agency trainers with the knowledge necessary to train employees within their agency. Agency trainers attend TTT session and then deliver instructor-led training for their agency.
Instructor-led Training (ILT)	ILT means there is an instructor present in the classroom conducting training. Employees are expected to follow along and interact where applicable. Individually assigned PCs are required for technical classroom ILT. In addition a projector is needed for the instructor.
Online or eLearning	Online or eLearning training is used to augment classroom instruction for employees. Online training can be delivered in the form of either a live Webinar, such as: WebEx, GoToTraining, etc.; or as On-Demand self-study. Webinar – Agencies may opt to deliver some training using the live webinar approach. This approach involves delivering a course in real-time over the internet with an instructor. This type of delivery allows State employees to ask questions, join in peer-to-peer discussions, and participate in real-time without leaving their desk. Self-Study – Agencies can also opt to allow employees to take courses as self-study. Online/eLearning self-study courses allow employees to learn at their own pace around to their own work schedules. They are available 24-hours a day, seven-days a week from any location where they have computer access.

The table on the following page is a summary of the ePerformance training courses and the available deployment options for the agency.

ePerformance Courses and Deployment Options

ePerformance Courses	Deployment Options
OLPD Courses	• Instructor Led Training *(Delivered by OLPD)*
Skillsoft (Skill Briefs)	• Online / eLearning *(Self-Study)*
ePerformance General Overview	• Online / eLearning *(Self Study)*
Performance Management Tool for Everyone	• Train-the-Trainer *(Delivered by Project ePerformance Team)* • Instructor Led Training *(Agency Delivered after TTT Session)* • Online / eLearning *(Self-Study)*
Performance Management Tool for Supervisors	• Train-the-Trainer *(Delivered by Project ePerformance Team)* • Instructor Led Training *(Agency Delivered after TTT Session)*
ePerformance Administrative Functions	• Instructor Led Training *(Delivered by Project ePerformance Team)*
Using ePerformance for Third Party Input	• Online / eLearning *(Self-Study) or (Webinar)*
Using ePerformance for Self-Evaluation	• Online / eLearning *(Self-Study) or (Webinar)*
Using ePerformance for Performance Management	• Online / eLearning *(Self-Study) or (Webinar)*

ePerformance Train-the-Trainer Training Timeline

The table below provides a visual timeline containing the high-level activities for the ePerformance End User Training (EUT) program

Agency subject matter experts, otherwise known as ePerformance System Administrators, received instructor-led technical system training the week of January 8th – January 14th. Additionally, Train-the-Trainer courses were held for both the courses, ePerformance – Tool for Supervisors and ePerformance Tool for Everyone in that same time period. Approximately 400 end users and/or trainers attended.

ePerformance End-User Training (EUT) Activities	October 2012				November 2012				December 2012					January 2013					February 2013				March 2013				April 2013				
	8	15	22	29	5	12	19	26	3	10	17	24	31	2	7	14	21	28	4	11	18	25	4	11	18	25	1	8	15	22	29
Training Material Design																															
Training Material Development																															
Training Calendar																															
Trainig Enrollment																															
Train-the-Trainer																															
ePerformance System Admin Training																															
Agency EUT Training (Online)																															
Agency EUT Training (ILT)																															

Frequently Asked Questions

Can our E-Learning staff develop a web-based training for our agency?

- DAS-HRD is currently developing technical training content and material(s) to support both instructor-led and web-based trainings, please plan to use these as they are delivered to assure compatibility to ELM and ADA compliance considerations.

- OLPD soft skill training is currently available in an instructor led format. We would encourage you to use this material in its original format if at all possible.

What timeframe does the agency have for offering training (i.e. supervisor exempt, non-supervisor exempt and bargaining unit) if the roll out is planned for late January?

- It is suggested that supervisors and managers receive training first as they can begin establishing performance criteria for the next evaluation cycle start date.

- The recommendation is to train supervisors February – April either through the ELM mass enrollment web-based activities an/or agency instructor led.

- Beginning in February and continuing through the summer, employees would be trained either through the ELM mass enrollment web-based activities and/or agency instructor led.

- Supervisors, managers, and employees will have access to job-aids and/or quick reference guides on the DAS, HRD Office of Workforce Administration, ePerformance webpage following go-live, January 28th http://das.ohio.gov/Divisions/HumanResources/WorkforceAdministration/PerformanceManagement/Eperftoolkit.aspx

Is there a print out of the entire performance evaluation that we can provide to the agencies that could in turn provide it to their folks when going through the training? They thought it would be able to have an overall view of the process to go through as they went through the training materials.

- Visit the DAS, HRD Office of Workforce Administration, ePerformance webpage and Toolkit at http://das.ohio.gov/Divisions/HumanResources/WorkforceAdministration/PerformanceManagement/Eperftoolkit.aspx and Click on the PE Template.

TRAINING Q&A

ePerformance Mass Enrollment Questions & Answers

When will competencies be sent?

- The list of terms and their definitions available to choose from will be shared in short order. Stay tuned for an ePerformance Next Steps communication coming soon with more on this and other topics.

Can you attach the draft internal communication for agencies to the follow-up email with the slide deck for this webinar?

- Due to the volume of requests for the document during the webinar, the draft was sent as an attachment with the follow-up email to attendees along with the PowerPoint slides.

Where is the draft internal communication for agencies located?

- Due to the volume of requests for the document during the webinar, the draft was sent as an attachment with the follow-up email to attendees along with the PowerPoint slides.

Approximately how much time is necessary to complete each of the web-based training (WBT) courses discussed during this webinar?

- The three (3) courses mentioned in the webinar were ePerformance Overview (WBT), ePerformance Tool for Supervisors (WBT) and ePerformance Tool for Everyone (WBT). The ePerformance Overview (WBT) can be reviewed in approximately two (2) hours. Both the ePerformance Tool for Supervisors (WBT) and ePerformance Tool for Everyone (WBT) can be completed in approximately two (2) to four (4) hours. Understand also that for each of these courses there are individual lessons contained within each so a supervisor or employee can login to complete individual lessons one a day for several days until the courses are complete. The course does not need to be completed in one seating and if the learner logs out and returns, the lesson will return them to where they left off. An individual lesson may only take between ten (10) to twenty (20) minutes depending on the learner.

How do we reflect Goals and Dimensions from the paper evaluation in the new system?

- Goals will transfer over to Section 6 – Goals and Performance Expectations
- Dimensions will crosswalk to the competency sections. For example, Customer Service will crosswalk to Section 2 - Statewide Competencies as Customer Focus. However, for purposes of transitioning to the new tool, the agency could also advise supervisors to use Section 6 – Goals and Performance Expectations to document the dimensions until the remaining dimensions are cross walked into either Section 3 – Agency Competencies or Section 4 – Classification Competencies.

Is there a way in ELM to get a report of who has taken the web-based trainings (WBT)?

- Yes. Until such time as your agency has been trained by ELM staff and has an agency ELM administrator, please send requests for ELM course reports to the ePerformance@das.state.oh.us inbox.

Can courses be taken now?

- The web-based courses for the supervisors and employees will be made available per the schedule noted during the webinar and as follows: Supervisors the week of January 21st and all other non-supervisory employees the week of January 28th. After these dates, employees can start the coursework.

Is training available for HR management?

- Training was made available for agency identified ePerformance system administrators the weeks of January 7 and January 14th. However, HR staffs will still be enrolled into the two (2) learner groups as either a supervisor or employee via mass enrollment.

If training has not been completed and a review is due, should we continue to complete the performance evaluation on paper?

- This will need to be determined at the agency level and communicated to supervisors for agency transition. The system will be available for use beginning January 28th and DAS will be tracking transitions across the enterprise as well as continuing to provide program, policy and technical support where needed/requested.

Will the ELM notification for mass enrollment tell those receiving the email where or how to login to take the training?

- Unfortunately, the template for the notification cannot be changed and while it will include the link to ELM and other contact information necessary to reset passwords, it will not give detailed instructions. Job aids will be posted for the employees to access at http://das.ohio.gov/Divisions/HumanResources/WorkforceAdministration/PerformanceManagement/Eperftoolkit.aspx

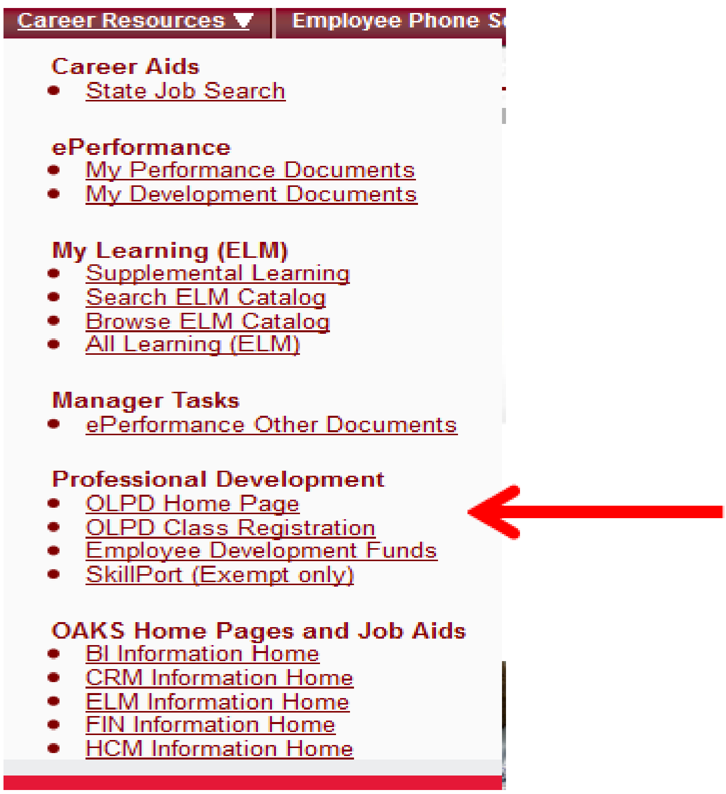
ePerformance Questions & Answers from Train-the-Trainer Sessions

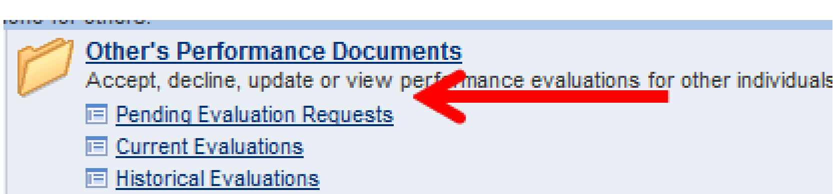
When employee X transfers into my agency can I, the ePerformance system administrator in the employee's new agency, see their historical performance evaluations or just those created in my agency moving forward?

- You will be able to view those that are created and completed in your agency. As for when an employee leaves (either supervisor or employee), the evaluation will travel with either employee role (supervisor or employee). However, the agency or system administrator can view those historical documents until the employee does leave and/or can download into a pdf. file electronically for storage or attaching to an email if requested by a supervisor. Also, the files are available to print.

When I am nominated, do I log in to portal via manager tasks?

- First, you log in through the myohio.gov portal. Then, follow the navigation in the screenshots below.





Can managers transfer documents to other managers or can only the ePerformance system administrator do it?

- Only ePerformance system administrator can transfer performance and/or development documents.

If an employee transfers to a new agency, can the old agency still see their ePerformance evaluations after the transfer occurs? Who do we contact then if we need access to the old records - either paper or in ePerformance - to look something up?

- You will be able to view those that are created and completed in your agency. As for when an employee leaves (either supervisor or employee), the evaluation will travel with either employee role (supervisor or employee). However, the agency or system administrator can view those historical documents until the employee does leave and/or can download into a pdf. file electronically for storage or attaching to an email if requested by a supervisor. Also, the files are available to print.

Under the current paper system, as the evaluation is routed up the chain, each higher level of approver might write something like "great job," "thanks for all you do," etc., in ePerformance where the approvers can make notes on the approval page. At what point can the employee see all of those comments?

- Comments can be made by all approving parties, but they won't be available to the employee until the evaluation is marked as "Available for Review." The only place that the Reviewer makes comments that the employee can review is on the actual performance document. The other place comments are made is in the approval comments associated with the approval workflow, but those are not seen by the employee and this section is available to help facilitate communications in the workflow process (e.g., to explain requested changes to verbiage in the document).

After the manager/rater submits an evaluation for approval, can people in the approval chain edit the comments made by others if they think those comments need to be modified?

- No. The document will need to be rejected back to be modified. The comments associated with the approval workflow which are not seen by the employee can be used to explain requested edits/changes to the document).

What are all of the date fields we need to think about that drive the 60 day reminders, probationary reminders, etc.? In reviewing the information that recently went out to agency change agents regarding blank dates in the system we think all of the fields are:

- The Probation Date field - used to prompt notifications within the agency for ePerformance after go-live for bargaining unit employees.
- Professional Experience Date field - All non-bargaining (exempt) employees are on newly assigned cycle start dates and will be located in the Professional Experience Date field.
- Grade Entry Date field - Following go-live the Probation Date field will populate from the Grade Entry Date field (as promoted, demoted) and/or may require manual entry (as reassigned).

If an agency extends a probationary period, will the system automatically adjust dates for notifications?

- There is an action / reason code in the system for probationary extensions and it should update the necessary fields to trigger appropriate notifications in ePerformance. Once the personnel action is completed and approved, the supervisor / manager (rater) will need to go in and 'clone' the current probation document, insert the new date range and cancel the original probationary document with the old dates.

If someone is placed in a TWL, who (which supervisor / manager (rater) will get the notifications?

- Whoever has the "reports to" PN for the position will get the notifications. If the field is blank it will kickback to a 'system' inbox which will be monitored by DAS. DAS will contact agencies to work on a solution to assure the document is tracked until such time as the "report to" is a populated field again.

If an employee has a poor probationary evaluation and the agency chooses to do a probationary removal, under the current paper system, the employee doesn't see the evaluation until the "last minute," and then the employee is removed. How should the agency handle such a situation in ePerformance?

- The current practice can be affected through the system in conjunction with the supervisor / manager (rater). The supervisor makes the evaluation available for viewing and the employee logs in to view before being removed. Accessing the document can be done from any computer equipped with the internet or the document can be printed if a computer is not available.

ePerformance is tied to employee IDs, but how does this impact travel in OAKS if travel is tied to a PN rather than an employee ID?

- Travel has no effect on ePerformance or vice versa as the two have no dependencies on each other.

If an employee is reporting to two levels of vacant positions, supervisor / manager (rater) and manager (reviewer), who will receive the ePerformance notifications? Does it keep rolling up?

- Whoever has the "reports to" PN for the position will get the notifications. If the field is blank it will kickback to a 'system' inbox which will be monitored by DAS. DAS will contact agencies to work on a solution to assure the document is tracked until such time as the "report to" is a populated field again.

Who can acknowledge an evaluation on behalf of an employee, just the supervisor /manger (rater) or the manager (reviewer) and/or ePerformance system administrator?

- Only the supervisor /manger (rater) can 'override' when an employee refuses to acknowledge the evaluation document. However, an exempt employee should recognize via email for the record that they witnessed the employee refusal as was advised under the OPRS process.

Has the issue with department IDs been resolved? Who can see an agency's department IDs, the ePerformance administrator and the appointing authority, or others too?

- Yes. Department level/row level security has been added and works the same as Job Data security.

If someone involved in a review approval process permanently leaves the agency during the process, should we add another approver or let things roll up?

- Whoever has the "reports to" PN for the position (or up the approval chain) will get the notifications. If a field is blank in the hierarchical structure, it will kickback to a 'system' inbox at the point it reaches that blank field in the workflow process which will be monitored by DAS. DAS will contact agencies to work on a solution to assure the document is tracked until such time as the "report to" is a populated field again.

What if we want other people to review the performance information but not be involved in the approval process? Could/should the ad hoc process be used for this?

- If what is being requested is not to obtain 3rd party input through the nomination feature, then the evaluation document can be saved as a .pdf electronic file by clicking on the printer icon and forwarding the electronic file to others via an attachment to email (e.g., HR staff before it goes through the workflow approval process).

When it's necessary to extend probation, why does an ad hoc evaluation need to be created?

- An Ad hoc evaluation template, distinguishes itself from the two (2) expected probationary templates with date ranges for mid- and/or final- probationary documents. It also provides a means for auditing so when reports are run, ePerformance system administrators can "compare the action/reason for extending probation to the number of Ad hoc templates created/completed.

Is there a way to set up a view-only profile in ePerformance, so someone in HR, for example, who's not involved in the approval process, could assist with viewing documentation but would not be able to edit or act on anything?

- The current supervisor / manager (rater), manager (reviewer), and or ePerformance system administrator can select the print icon from the document page, save it as .pdf electronic file and forward it to others for review by attaching the file to an email.

My agency uses PIPs when we want or need someone to increase their knowledge on a particular topic, so for us PIPs are not necessarily negative. Can we continue to do this in ePerformance?

- Yes. The agency can create a Performance Improvement Plan (PIP) in ePerformance at any point. However, because PIPs are required when the Overall Rating is below Meet Expectations, it is advisable for the agency to consider using the Career Development Plan (CDP) in ePerformance rather than a PIP.

Should we use ePerformance for college interns?

- College interns are unclassified, so it is up to the agency through your agency policy whether to include evaluations for unclassified employees in ePerformance. The code only requires that classified employees receive performance evaluations.

If we have several employees in the Program Administrator 2 classification, for example, and they all do different tasks, can we develop our own classification competencies by using the competency catalog in ePerformance, until such a time that DAS develops classification-specific competencies?

- Yes as they relate to the duties outlined in the position description.

If an employee transfers from one institution to another in the same agency (e.g., DRC), does the new manager in the new institution have access to the historical documents? Or is it just like if a person is transferred to a new agency altogether, in which case the new manager in the new institution could not access the historical documents for the employee?

- Historical documents in ePerformance can be viewed by the employee and the supervisor / manager (rater) who completed the document(s). The supervisor / manger (rater) in a different institution will not be able to view the documents, but the ePerformance system administrator in the new institution can.

How does a manager know what begin and end dates to enter on an evaluation? Will the ePerformance system automatically populate that?

- The supervisor / manager (rater) who is responsible for creating the document should check with his/her human resources office for the correct dates. The system will not automatically populate the start and end dates for the evaluation period.

How does a manager know what the probationary end date is? Will the ePerformance system automatically populate that?

- If this information is not communicated upon hire to the supervisor / manger (rater) responsible for creating the document, the manager should check with his/her human resources office' for the correct dates. The system will not automatically populate start and end dates for the evaluation period.

What if an evaluation is due but any manager in the approval chain, or even the employee, fail to sign their parts of the evaluation?

- The evaluation cannot be fully routed through the approval process if a manager involved in the approval fails to complete his/her part. If the employee fails to sign the evaluation, the supervisor / manager (rater) can have an exempt employee witness and recognize this by email for the file before conducting an "override" in the system which signifies the employee's refusal to acknowledge the documents.

What do we do if an employee is in a discipline “mode” and our Labor Relations Officer requested that the manager not complete the employee’s performance evaluation until after the disciplinary matter is settled, which can take months if the case makes it all the way to arbitration?

- From an ePerformance perspective, the evaluation stay in que and will appear on the Late Documents report until the supervisor / manager (rater) is advised to complete the evaluation. From a labor relations perspective, please ensure you work with the Office of Collective Bargaining and/or DAS HRD/OCB Policy.

If we promote someone internally and we mutually agree with the employee that there will be a trial period for the promotion to make sure both parties remain interested in it, do we utilize an Ad Hoc evaluation or a Probationary evaluation?

- For promotions to classified positions, employees shall serve a probationary period. In that situation, the Probationary evaluation is the correct one to use. Please refer to Ohio Administrative Code (OAC) Chapter 123:1-19 for more information. For unclassified positions, if it’s a promotion that’s been approved through all appropriate channels (e.g., Governor’s Office), a probationary evaluation would still be appropriate. However, there is not a requirement that ePerformance be utilized for employees in unclassified positions. If the movement is an internal lateral and does not necessitate a probation period, but the employees agrees to a similar ‘trial’ period, the Ad hoc would be the correct document template to use in place of a Special evaluation under OPRS.

Does the ePerformance System Administrator get an e-mail message when an evaluation is completely done? If not, is there a way to turn on this feature so we can properly track evaluations?

- No, the ePerformance System Administrator will not receive such a notification. The ePerformance system administrator should be establishing updated procedures to include logging in to ePerformance each day to track evaluations as well as use system reports and those that will become available through Business Intelligence (BI) in the coming months.

We have managers who are reluctant to give ratings below “meets.” The PIP warning that displays in red font with yellow highlighting will make them even more reluctant to give ratings below “meets,” let alone PIPs. The PIP warning is too harsh; can it be softened?

- If an employee’s overall rating is below “meets expectations,” the system will generate the PIP warning message. The message is a reminder to the supervisor / manager (rater) to create the document since it is not automatically generated. Please work with your managers so that they understand the intent of the message.

If attachments are uploaded into ePerformance and are included as part of a performance evaluation, will they automatically print when we select the print option to print the evaluation, or will we have to go back and find them in the system and print them?

- No, attachments will not automatically print with the evaluation document. Attachments will need to be printed separately from the ePerformance evaluation view page.

Can employees attach documents?

- No, only managers and ePerformance system administrators can attach documents. Employees should give the documents they want to attach to their immediate supervisor for review and to attach as appropriate.

If an employee gives a document to a supervisor to attach it to the evaluation and the supervisor doesn't attach it, what can the employee do?

- The employee should contact his/her human resources department for assistance.

When will the competencies be available? This rolls out in less than two weeks and we have not seen any competencies yet other than customer focus. If DAS wants us to start using ePerformance at Go-Live, it would be very helpful to have DAS' competencies as soon as possible so we can start cross-walking our existing competencies with the ones DAS created.

- The Competency Catalog terms and definitions were shared on January 22, 2013.

What is the date that the use of ePerformance becomes mandatory?

- The use of ePerformance is not mandatory at this time. DAS will ,however, be tracking usage starting in February.

On the current paper evaluation form, the performance log, goals and dimensions pages are very easy to use. Can these be included in ePerformance, particularly the performance log, with date fields for tracking?

- The performance log will not be a unique section on performance or development templates. Now since ePerformance is easily accessible for the supervisor, s/he can access 24/7 to document performance observations or milestones directly on the performance evaluation throughout the year. The Goals section translates to Goals and Performance Expectations, Section 6 whereas the Dimensions are transferrable to the Agency or Classification Competencies, Sections 3 or 4. Any of the sections are early to use, simply click the + button to add new or Edit to revise and Save.

Can you explain the process for editing an evaluation if it's already been sent to an approver? If the supervisor / manager (rater) edits it after it's sent, will the manager (reviewer) get a new notification? Or does the supervisor / manager (rater) even have access to edit unless the manager (reviewer) or ePerformance system administrator reject it and sends it back?

- No, the supervisor / manager (rater) cannot access to edit once it is moved to the next step in the workflow approval process unless the manager (reviewer), ePerformance system administrator, or Appointing Authority, where applicable, reject the document and send it back for editing.

After mass enrollment in ELM, how do we know which employees and supervisors have taken their respective classes if we're not doing instructor-led training?

- Contact ePerformance@das.state.oh.us. DAS-HRD will work with ELM staff to query agency specific reports.

6. POLICY

PERFORMANCE IMPROVEMENT PLAN (PIP) DOCUMENTS:

Within ePerformance, a Performance Improvement Plan (PIP) is required for an employee with an overall rating of anything below "Meets Expectations". The ePerformance system generates a warning message for the supervisor and notes the required completion of a PIP when this occurs.

- Identify how your agency will monitor PIPs
  - Will the agency provide guidance on timeframes?
  - Who will be responsible to remind and conduct the PIP follow-up?
- Will your agency provide guidance on PIP closure practices?

CAREER DEVELOPMENT DOCUMENTS:

Career Development documents are optional within ePerformance and as such can be initiated by either and employee or supervisor / manager (rater).

- Regarding the use of Career Development documents, will your agency:
  - Require the use?
  - Support use, but not mandate?
  - Restrict the use of the Career Development document
    - I. If yes, what criterion will be used?
- Will your agency create criteria for what constitutes appropriate career development activities?
  - Only activities directly related to improving current performance
  - Including activities that might lead to future opportunities
    - I. Within your agency
    - II. Within state government generally
- Will there be a review component for potential training and/or professional development costs generated by commitment made in a Career Development (either training dollars or release time costs)?
  - If yes, who will be responsible for that review?
  - Will a new policy be required?

SELF-EVALUATIONS

Self-evaluations are optional within ePerformance and are only initiated when the supervisor / manager (rater) establishes performance criteria.

- Regarding the use of Self-evaluation documents, will your agency:
  - Require the use?
  - Support the use, but not mandate?

AGENCY AND CLASSIFICATION COMPETENCIES

Please reference Appendix D – Statewide Competency Catalog containing the competency terms and definitions for application in the Agency and/or Classification sections of the performance evaluation. Use the catalog to determine agency use and communication via agency policy. More information will follow.

Frequently Asked Questions

When and how is the employee given the option for self-evaluation and how does it fit in the system?

- The employee self-evaluation process can begin after performance criteria are established and before the manager has completed the final performance input into the employee's evaluation. The self-evaluation is considered optional in the overall performance management process and is made available to those agencies currently obtaining employee input as part of their performance management process and/or to agencies that wish to include this process in the

THIRD PARTY INPUT / NOMINATIONS

Third party input / nominations are optional within ePerformance and are only initiated when the supervisor or ePerformance System Administrator requests input from another exempt employee.

- Regarding the use of Third-Party Input / Nominations, will your agency:
  - Require the use?
  - Support the use, but not mandate?

Frequently Asked Questions

If the protocol for ePerformance has not been followed, what procedure can an employee follow?

- As is the case today, the employee will follow Agency policy or may reference the State Performance Management website for additional information http://das.ohio.gov/Divisions/HumanResources/WorkforceAdministration/PerformanceManagement/Eperftoolkit.aspx

If the probationary evaluation occurs around the same time as the annual review cycle, is an annual evaluation necessary?

- We anticipate that as employees successfully complete probation there will be an adjustment period to transition over to the annual cycle. In that first annual cycle for an employee ending probation, their cycle may be only 9 months or up to 15 months. More information will be provided as we continue testing the system and working with Policy.

Do guidelines need to be made to limit or define appropriate attachments?

- Guidelines will be established to define appropriate attachments, but as of now there are no size limitations.

7. USER SUPPORT

REPORTS

- BI is working with HRD staff to develop additional reporting capabilities for ePerformance. Note that BI staff will announce and provide training post go-live. More information will follow.
- In the meantime, determine who will be responsible for generating and/or distributing ePerformance reports
- Determine who is responsible for reviewing/monitoring compliance with completing evaluations in ePerformance
- What is your agency's expected level of compliance with evaluation completion?
- How will your agency measure timeliness of completion?

EPERFORMANCE USER SUPPORT

- Identify who will be responsible for addressing ePerformance related support needs and questions at your agency
    - Create a contact list of trainers, HR ePerformance administrator, change agents and other ePerformance subject matter experts
- Please reference Appendix E – Tools for Communication for the ePerformance Contact Sheet listing information for ePerformance Program, Policy and Technical Support.

Frequently Asked Questions

Will there be reminders for managers who haven't completed evaluations?

- No, there will be reports for ePerformance system administrators to run and to use to follow-up with supervisors / managers (rater), etc. to assure the process is completed, if Due Dates are surpassed (e.g., Missing or Late reports).

Will the system recognize that an employee is on disability and won't need to be evaluated?

- No. The reminders will be based upon the probation/cycle dates. Reports can be modified to exclude employees in certain statuses when trying to calculate stats or analytics following implementation.

Can we have a notification sent to multiple people in ePerformance?

- Only the employee, supervisor / manager (rater) and manger (reviewer) will receive notifications. Others such as ePerformance system administrators will have to establish daily procedures to include logging in to check the actionable items daily. In addition, other exempt employees who are nominated to provide 3rd Party input will receive notification or those who are Ad hoc'd into the workflow.

8. CONTACT INFORMATION

For additional questions about the resources presented in this guide, please contact:

Statewide Program Support:

Matt D. Telfer, ePerformance Program Manager

Department of Administrative Services

Human Resources Division

Office of Workforce Administration

E-mail: Matt.D.Telfer@das.state.oh.us

Phone: 614-728-8944

Soft Skills/Non-Technical Training (non-system training):

Lisa Springer, Training Administrator

Department of Administrative Services

Human Resources Division

Office of Learning and Professional Development

E-mail: lisa.springer@das.ohio.gov

Phone: 614-995-1200

Skillsoft/Learn IT Ohio:

Mary Cornwell

Department of Administrative Services

Office of Information Technology

Office of the State CIO/Administration

E-mail: Mary.Cornwell@ohio.gov

Voice 614.995.0154 Fax 614.644.9152

9. APPENDICES

APPENDIX A – TASK SHEETS

Task 5: Communicate to Agency: ePerformance Overview

Due Date: September 30, 2012

Action for Change Agents:

1. Review the Change Agent Guide, "ePerformance Overview" document and the following information provided with this task.

2. Communicate the ePerformance Overview to your Agency using the "Task 5 ePerformance Overview" document provided.

3. Once you have reviewed the Performance Management Evaluation process with your Agency, please answer the following three questions:

    a. Is there any part of the evaluation process that your Agency does differently? If yes, please explain.

    b. Do managers within your Agency share the responsibility of evaluating the same employee? This is known as Third Party Input.

    c. Does your current Agency's performance evaluation process include the employee self-evaluation component? If yes, will you continue to use it in ePerformance? If no, are you planning on incorporating it into your process using ePerformance?

4. Send an e-mail to OAKS HCM Upgrade (oakshcm.upgrade@oaks.state.oh.us) with the information above and a note to let us know that the ePerformance Overview has been shared with your Agency in order to verify completion of this task.

    PLEASE NOTE: In your confirmation, please include how you completed this task and whether the information generated discussion/conversation within your Agency. Please share any questions or comments with us. We will use this information to develop frequently asked questions and it will help shape future communication.

ePerformance Overview Change Agent Materials

What materials can I use to provide the information on the ePerformance Overview to my Agency?

1. ePerformance Overview document

2. The one page documents: 1) Leading Practice Assessment Analysis, 2) Movement from Manual to Automated Process, 3) Detailed Process Flow – Probation Review, 4) Detailed Process Flow – Annual Review

3. Change Agent Guide

Where are the materials I can use to provide the project overview to my Agency?

4. All HCM Upgrade Change Agent materials are located on the myOhio.gov website for reference. https://myohio.oaks.ohio.gov/psp/PAPRD/EMPLOYEE/EMPL/h/?tab=OH_HCM_HOME. View the materials by scrolling down on the right of the webpage to the “HCM Documents & Job Aids” -> “HCM 9.1 Upgrade” folder.

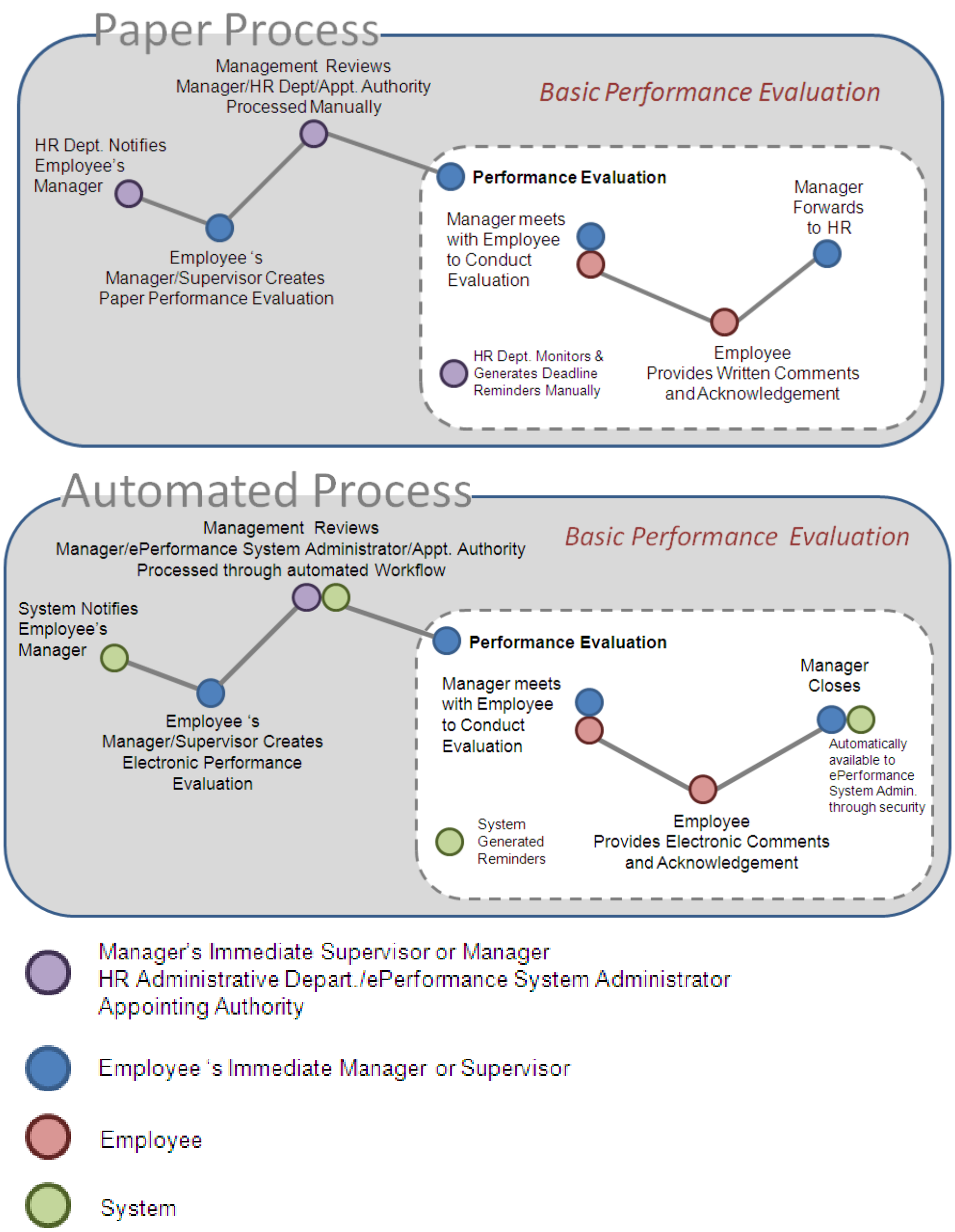
State of Ohio Performance Against Leading Practices – Performance Management

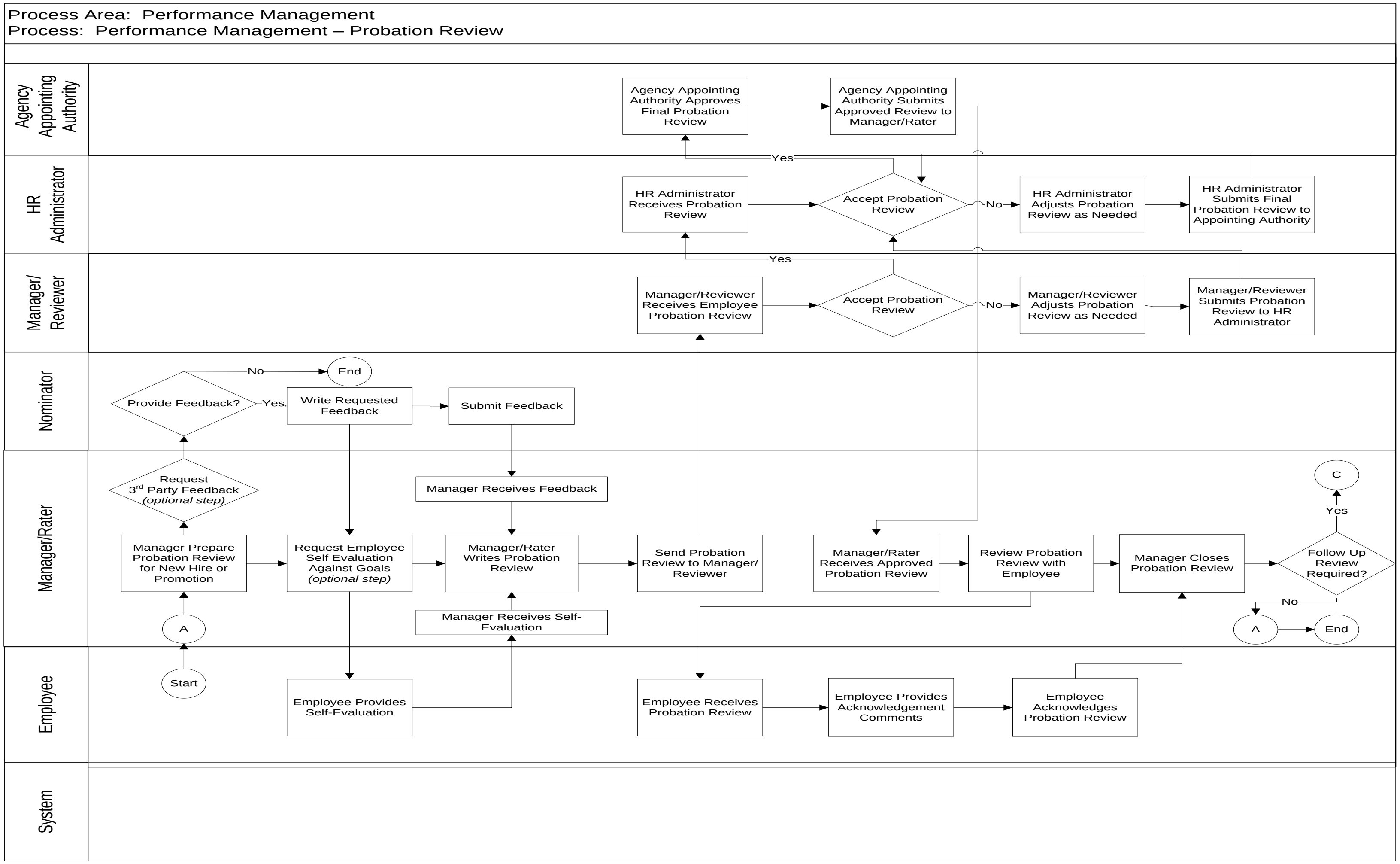
Capability	Basic	Progressive	Mastery
Goal Development	• Job descriptions used as reference points • Objectives not checked for business alignment • Annual objective setting and progress reviews	• Job descriptions are updated and align with business goals • **Employees are guided to line up objectives with specified agency goals**, **with partial cascade** • Annual and mid-year review based on SMART objectives	• Business goals fully integrated with performance management and used to deliver specific change • Strategy hardwired to objectives and SMART goals managed to completion
Competency Management	• Competencies used but no defined proficiency levels, or not utilized	• **Competencies and proficiency levels** are used; emphasis in evaluating both outcomes (results) and inputs (behaviors)	• Competencies serve as the “glue” to unite job level & family
Performance Evaluation	• Explicit standards with unrealistic use of ratings, i.e. all in middle or too high • No or minimal employee input	• Poor performance addressed with **normal-curve type ratings distribution** • Manager’s input supplemented with other feedback and employee input	• Segmentation based on performance, competencies & value of business contribution; effective management of ratings distribution • Clear links to career paths & mobility
Automation & Integration	• Paper-based process and/or online process applications are piecemeal	• **Online HR applications with some connections**, usually via competencies	• Online applications fully integrated
Governance & Audit	• No process evaluation, revised on as needed basis • No standard audit and quality control procedures, reviewed on as needed basis with no standardized criteria	• Process reviewed at agreed periods • **Standard audit and quality control** procedures established with standardized criteria	• Leading practice researched and infused regularly • Continuous process improvement

◇ = Current state

★ = Desired future state

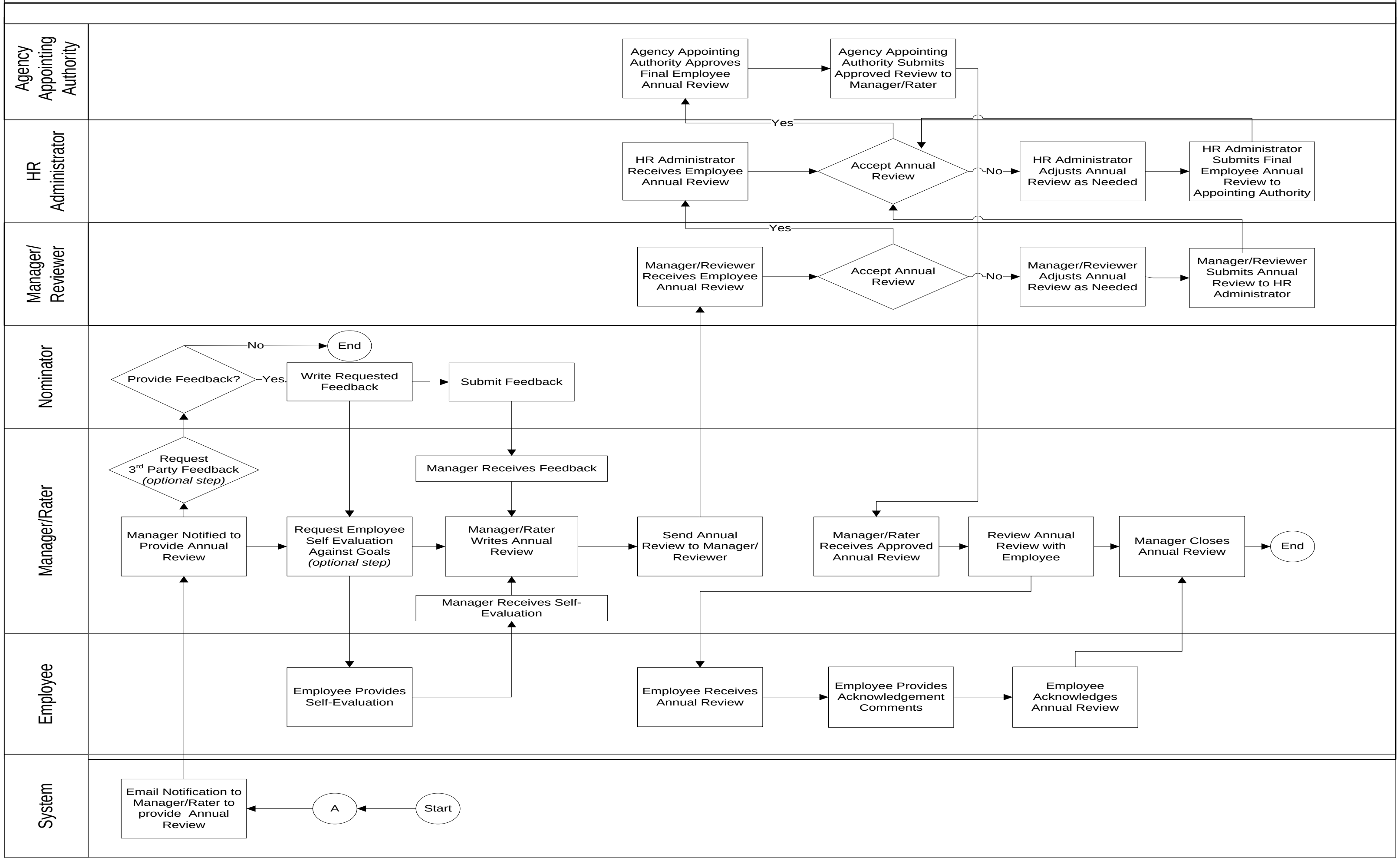
Movement from Manual to Automated Process





Performance Management Probation Review “To-Be” Process Flow

Process Area: Performance Management
Process: Performance Management – Annual Review



Task 6: Communicate to Agency: ePerformance Timeline for Annual Performance Management Cycle(s)

Due Date: **September 4, 2012**

Action for Change Agents:

5. Read about the Performance Management Cycle and what decisions need to be made by your Agency.

6. Work with your Agency Leadership to select the annual performance cycle that best aligns with its business cycle.

7. Send an e-mail to Jessica Schuster (Jessica.Schuster@das.state.oh.us) by September 4th, 2012 with your Agency's decision.

Select Performance Management Cycle

What is a Performance Management Cycle?

A periodic review and evaluation of an individual's job performance which supports the performance management process of maintaining or improving employee job performance through the use of an evaluation document, continuous monitoring, coaching, and providing on-going feedback. **All employees who have completed their probationary periods* shall be evaluated once a year. The annual evaluation shall measure the employee's performance for the year immediately preceding the evaluation date or for that portion of the year after the completion of the employee's initial probationary period.**

**Probationary periods vary and are described in either code or respective contracts.*

Why does my Agency need to select an Annual Performance Management Cycle for Exempt employees?

5. The OAKS HCM Team will program the system so it will generate e-mails to notify employees to act on their role and it allows DAS HRD to gauge and allocate resources at the various cycle start periods in order to provide support prior to and throughout each cycle selected by your Agency.

6. State of Ohio reviewed the current performance management process against leading practices and found that progressive organizations align performance cycles with business cycle allowing for an increased linkage between organization and employee results. Thus the State has identified performance cycles as a key element in the State of Ohio Performance Management process.

- **IMPORTANT NOTE**: Based on current Administrative Guidelines and Union contracts in place, only the Exempt employee classifications can be placed in an annual performance cycle.
- **However, please notify DAS in your cycle selection response, if your Agency already has a specific agreement or MOU in place allowing bargaining unit staff to all begin on one (1) annual evaluation cycle date and attach the agreement .**

What should I consider when assisting my Agency in selecting an Annual Performance Management Cycle?

- Annual Performance Management Cycles will start the pay period following the beginning of each quarter Jan 1, April, 1, July 1, and October 1 (e.g., April 7, 2013 or October 6, 2013). Agencies are to select up to two (2) cycle start periods.
- Change Agents are to work with their Agency Leadership to select the annual performance cycle(s) that best aligns with its business cycle. This will allow the annual review of the Agency's strategic plan to align with the employee's annual performance expectations.
- Consider when the overall strategic plan is reviewed and Agency goals established and busy periods during the business cycle (i.e., the Agency will not want to have managers completing annual performance evaluations during peak business season).
- Evaluate operations (e.g., consider breaking groups into operations vs. security, consider funding of positions – if many positions are federally funded then may want a cycle time to coincide with funding stream availability, consider the mission of the Agency and high-volume periods to avoid initiating an evaluation cycle at the same time, etc.).
- The sole factor in choosing an Annual Performance Management Cycle is the Agency's business cycle and ensuring employee goals are tied to the Agency's strategic plan.
- Consider how up-to-date and accurate employee position descriptions are. Having up-to-date and accurate position descriptions will help to align the Agency mission to the strategic plan, to the classification, and to the position, resulting in a clear path to developing the employees' annual performance expectations.
- DAS can work with Agencies in reviewing the trend of current employee population performance cycles to see the potential impact of change (i.e. who will get a performance evaluation less than a year period from the last one, who will get a performance evaluation in over a year period due to the change). Send all questions to Jessica.Schuster@das.state.oh.us.

Once my Agency has selected an Annual Performance Management Cycle – what do I do?

- Once the Change Agent has worked with Agency Leadership to identify the appropriate Annual Performance Management Cycle(s) for the Agency's exempt employee population, you should send an e-mail to Jessica Schuster by September 4th (Jessica.Schuster@das.state.oh.us).

Task 8: Identify ePerformance Trainers for Your Agency

Due Date: October 1, 2012

Action for Change Agents:

8. Review the Task 8 document and identify your Agency's Trainers.

9. To verify the completion of this task, please send an e-mail to OAKS HCM Upgrade (oakshcm.upgrade@oaks.state.oh.us) with the employee's name, position/role and e-mail address.

10. In the e-mail, please include the information requested in the table at the bottom of this task sheet to indicate if the trainer is interested in:
    a. ePerformance System Train-the-Trainer (i.e., for employees and supervisors/managers)
    b. OLPD Soft Skills Goal Setting Train-the-Trainer
    c. OLPD Soft Skills Writing and Giving a Performance Review Train-the-Trainer

Identifying Trainers for Your Agency

Identifying Trainers for your Agency is a key component to the training and organizational change management processes. The ability to identify your own trainers provides the additional benefit of having a subject matter expert on site who understands your Agency's specific culture. In addition, the train-the-trainer sessions allow your Agency to have more control of the scheduling dynamic of the ePerformance rollout.

Keep in mind training can only be as good as the people conducting it, so please use care when selecting your Agency's Trainer. The list below has been provided in order to assist you in identifying qualified candidates for the role of your Agency's Trainer(s). Trainers may volunteer for more than one option if their schedule permits.

ePerformance System Train-the-Trainer

- It is good for a Trainer to have experience with Job Data and Position page in OAKS.
- If they do not have experience with Job Data and Position page in OAKS, ensure the trainer has good facilitation skills and can partner with an Agency SME who does have experience with Job Data and Position pages and is available to assist the technical trainer.
- Trainers should have availability December through February to attend both the Train-the-Trainer as well as to *begin* providing the training at the Agency.
- Trainers will be required to attend a train-the-trainer session in December. Train-the-Trainer schedules will be coordinated follow the response to this task, stay tuned for more to come.
- Trainers must understand the Performance Management process for the State.

- Trainers will have the option to attend the soft skill classes available through OLPD for additional support and/or refresher about the State's Performance Management process. (e.g., 4 classes)

Soft Skills Train-the-Trainer

- Ensure that the trainer has good facilitation skills.
- Trainers must have availability to teach one-day classes (per their schedule) from November through February.
- Trainers will have the option to attend a two-day train-the-trainer session for the course depending on skill level.
- The train-the-trainer sessions are scheduled on the following dates:
    - October 30 & 31 for Goal Setting
    - November 13 & 14 for Writing and Giving and Performance Review
    - Note: Please still submit the trainer's names even if they are unavailable to attend the soft skill train-the-trainer session on the designated dates. Additional dates may be added if the need exists.

Identify Trainers

When you have identified the trainer(s) for your Agency, please complete the table below and e-mail it to oakshcm.upgrade@oaks.state.oh.us.

Agency	Name	E-mail Address	Role/Position	Type of Trainer ('ePerformance System', 'OLPD Soft Skills Goal Setting', 'OLPD Soft Skills Writing and Giving a Performance Review')

Task #11: Identify ePerformance Security Roles

Due Date: November 14, 2012

Action for Change Agents:

11. Identify resources from your Agency for the ePerformance System Administrator and Appointing Authority security roles.

12. Using the information provided below, complete the table at the bottom of the task sheet and send an e-mail to oakshcm.upgrade@oaks.state.oh.us to verify completion of this task.

ePerformance Security Role Descriptions

Outlined below are the ePerformance System Administrator and Appointing Authority roles. Please use these descriptions to determine who within your Agency would be an appropriate resource to assign to these security roles. Note that there can be multiple ePerformance System Administrators for an agency. In addition, not all agencies will elect to have a resource assigned to the Appointing Authority security role.

ePerformance System Administrator Security Role

Who: ePerformance System Administrator Security Role

What: The ePerformance System Administrator security role is the Agency owner of ePerformance. This is the central role for approval, reporting, creating, transferring, cancelling and reviewing of documents. The ePerformance System Administrator role is responsible for assuring that the workflow process is accurate. The ePerformance System Administrator role can also act as the final approver for the signature process. This can occur when the agency Appointing Authority designates and authorizes the ePerformance System Administrator to approve/sign all agency performance evaluations on his/her behalf.

Why: Users will triage inner agency issues to the ePerformance System Administrator. Users with this security role will liaise with DAS if escalation is needed.

- Resources in the ePerformance System Administrator security role will receive train-the-trainer ePerformance system training.

- Multiple people can be named to the ePerformance System Administrator security role within an agency (e.g., multiple sites/locations for an agency may each have a ePerformance System Administrator security role assigned).

ePerformance Appointing Authority Security Role

Who: ePerformance Appointing Authority Security Role

What: The Appointing Authority is the final approver and reviewer, as needed, for internal processing. That is this role's only intended purpose. Not all agencies will have or require an Appointing Authority security role.

Why: The Appointing Authority security role is available for those agencies wishing to maintain approval in the approval/signature process. Please note that this role is limited to only these features. This role will be used as needed by agencies.

- Note: A single position cannot have both the role of an Appointing Authority and ePerformance System Administrator.

Identify ePerformance Security Roles

Using the table below, include the agency, name, employee ID and security role for those resources you would like to identify as ePerformance System Administrators and/or Appointing Authority for your agency. The table and contents should be e-mailed to oakshcm.upgrade@oaks.state.oh.us to verify completion of this task.

Agency	Name	Employee ID	Security Role (System Admin or Appointing Authority)

NOTE: The OAKS security forms will be updated at a later date for agencies to maintain their security roles. We will ensure people designated to the roles listed above are updated during training.

Task #14: Sign up for ePerformance System Administrator Training and ePerformance Technical Train-the-Trainer Courses

Due Date: Friday, December 21, 2012

Actions for Change Agents:

1. Assign identified ePerformance System Administrators to attend train-the-subject matter expert sessions from the list provided in the task sheet below. Return the requested information in the corresponding table to oakshcm.upgrade@oaks.state.oh.us.

2. Assign identified ePerformance Trainers to attend train-the-trainer sessions from the list provided in the task sheet below. Return the requested information in the corresponding table to oakshcm.upgrade@oaks.state.oh.us.

1. Select Attendance Date for ePerformance System Administrator Training Session

The following courses are available for Train-the-Subject Matter Experts sessions. The courses are delivered as instructor led classroom training.

Course for ePerformance System Administrators (Train-the-Subject Matter Experts)

ePerformance Administrative Functions

Course Description:

This course begins with an ePerformance demonstration that illustrates how the system works from the beginning of the performance evaluation process to completion. Administrators will gain an understanding of the complete performance evaluation process, where workflow impacts the process, and how managers/supervisors complete their specific tasks within the system. They will be introduced to the ePerformance electronic templates, their components, and how to they are used to create performance evaluation documents, performance improvement plans (PIP), and career development plans.

Understanding where the various elements of a performance evaluation are located within the system templates, how they are setup to be used, and when to apply them will also be discussed. Elements of the performance evaluation template include: Performance Goals and Objectives, Statewide Competency, Agency Competencies, and the Rating Model.

At the conclusion of this course administrators will learn the unique tasks that are specific to their system support role. Administrators will understand how to create group templates, transfer a document to a new manager, assign ad-hoc approvers, cancel documents, and how to re-open a document when necessary.

It is important to note that content from the course 'Performance Management Tools for Supervisors' is included in this course; therefore it is not necessary for ePerformance System Administrators to attend both courses.

- All ePerformance System Administrators should attend one (1) course for ePerformance Administrative Functions.

Course	Date	Time	Location
ePerformance Administrative Functions	1/8/2013	8 AM - 5 PM	DAS Surface Road - Apple Room
ePerformance Administrative Functions	1/9/2013	8 AM - 5 PM	DAS Surface Road - Apple Room
ePerformance Administrative Functions	1/10/2013	8 AM - 5 PM	DAS Surface Road - Apple Room
ePerformance Administrative Functions	1/10/2013	8 AM - 5 PM	DAS Surface Road - Bonzai Room
ePerformance Administrative Functions	1/11/2013	8 AM - 5 PM	DAS Surface Road - Apple Room
ePerformance Administrative Functions	1/14/2013	8 AM - 5 PM	DAS Surface Road - Apple Room
ePerformance Administrative Functions	1/15/2013	8 AM - 5 PM	DAS Surface Road - Apple Room
ePerformance Administrative Functions	1/15/2013	8 AM - 5 PM	DAS Surface Road - Bonzai Room
ePerformance Administrative Functions	1/17/2013	8 AM - 5 PM	DAS Surface Road - Bonzai Room
ePerformance Administrative Functions	1/18/2013	8 AM - 5 PM	DAS Surface Road - Apple Room

Assign identified ePerformance System Administrators to attend train-the-subject matter expert sessions

Please provide a list of identified ePerformance System Administrators from Task 11 (see excel spreadsheet in "Supporting Documents" section) who will attend the above sessions. Using the table below, please return the requested information to oakshcm.upgrade@oaks.state.oh.us.

Agency	Name	E-mail Address	Role	Course Name	Date	Time
			ePerf System Admin			
			ePerf System Admin			
			ePerf System Admin			

2. Select Attendance Date(s) for ePerformance Technical/System Train-the Trainer Session(s)

The following courses are available for Technical/System Train-the-Trainer sessions. We encourage agencies to provide instructor led training on using the new tool and as such, this training will prepare someone in the agency to deliver the training. Also, recall agencies were advised that where the Subject Matter Expert (a.k.a. ePerformance System Administrator) was not assigned dually as the technical trainer, they co-lead the course assuring process questions can also be answered during the course of technical training. The courses below are delivered as instructor led classroom training.

Courses for Technical/System Train-the-Trainers (TTT)

Performance Management Tool for Everyone

Course Description:

Preparing employees to participate in the performance evaluation process is the key focus of this course. Employees will learn how the current performance evaluation process has been built into the new system tool and the importance of being an active participant in their performance evaluation. They will be introduced to the ePerformance electronic template, understand its various components, learn how to set their performance goals and objectives, view their competencies, and understand the rating model. Employees will also learn how to access and view their current performance documents, acknowledge or deny a performance evaluation, and add comments and/or attachments all within the new system tool.

Performance Management Tool for Supervisors (PMTS)

Course Description:

This course begins with an ePerformance demonstration that illustrates how the system works from the beginning of the performance evaluation process to completion. Managers/Supervisors will gain an understanding of the complete performance evaluation process, where workflow impacts the process, and how to complete their specific tasks within the system. Managers/Supervisors will be introduced to the ePerformance electronic templates, their components, and how to use them to create performance evaluation documents, performance improvement plans (PIP), and career development plans. Understanding where the various elements of a performance evaluation are located within the system templates, how they are setup to be used, and when to apply them will also be discussed. Elements of the performance evaluation template include: Performance Goals and Objectives, Statewide Competency, Agency Competencies, and the Rating Model.

- All technical/system trainers should attend either or both of the following, as assigned by the agency: Performance Management Tool for Everyone and/or Performance Management Tool for Supervisors.

Course	Date	Time	Location
Performance Management Tool for Everyone	1/14/2013	1:00:00 PM - 4:30 PM	DAS Surface Road - Bonzai Room
Performance Management Tool for Everyone	1/16/2013	8:30 - Noon	DAS Surface Road - Bonzai Room
Performance Management Tool for Everyone	1/16/2013	1:00:00 PM - 4:30 PM	DAS Surface Road - Bonzai Room
Performance Management Tool for Everyone	1/18/2013	8:30 - Noon	DAS Surface Road - Bonzai Room
Performance Management Tool for Supervisors	1/11/2013	8:30 AM - 4:30 PM	DAS Surface Road - Bonzai Room
Performance Management Tool for Supervisors	1/16/2013	8:30 AM - 4:30 PM	DAS Surface Road - Apple Room
Performance Management Tool for Supervisors	1/17/2013	8:30 AM - 4:30 PM	DAS Surface Road - Apple Room

Assign identified ePerformance Technical System trainers to attend train-the-trainer sessions

When you have identified which of your Technical System trainers will attend the above sessions, please return the following table to oakshcm.upgrade@oaks.state.oh.us. A list of your agency's identified Technical System trainers is included in the "Supporting Materials" section of this document.

Agency	Name	E-mail Address	Role	Course Name	Date	Time
			Technical System TTT			
			Technical System TTT			
			Technical System TTT			

3. Supporting Documents

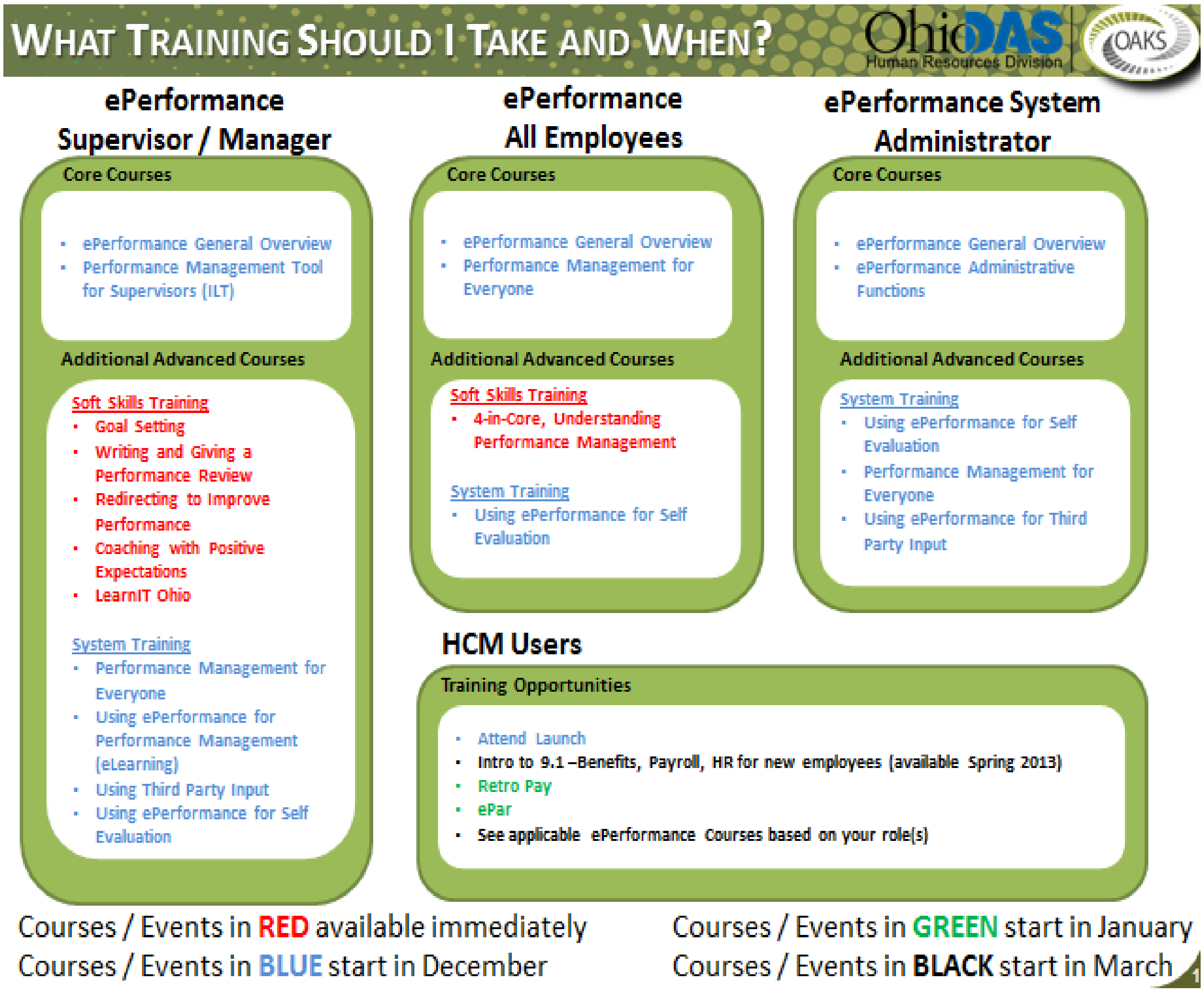
Identified ePerformance System Administrators and ePerformance Technical/System Train-the-Trainers

ePerformance System Administrators and ePerformance Technical/System Train-the-Trainers are identified in 2 separate tabs on the spreadsheet below.

Task 14 Supporting Document - ePerform

APPENDIX B – COURSE CATALOG FOR EPERFORMANCE TRAINING

The illustration below represents the recommended training courses for employees. You may need to take more than one block of courses based on your current position and role(s). Use this illustration to guide you through the course catalog.



Technical System Training Courses

Offered by DAS HRD Office of Workforce Administration

To register visit: myohio.gov and click on ELM **(More information to follow)**

For All Employees:

ePerformance General Overview

Course ID: **PMGO** **ELM Registration Number:** DAS-PM-002

Course Delivery: Online / System Training

Course Duration: 60 Minutes

Course Description:

This course provides a high level overview of ePerformance. It describes the overall ePerformance process, the associated role-based system workflow, the advantages of using an automated system vs. a paper system, and key differences. This course also introduces the three recommended Learning Paths for ePerformance users. (Employee, Manager/Supervisor, ePerformance System Administrator, a.k.a.: HR Admin.) Learning Paths contain the recommended ePerformance training courses for the associated role. They can be used to assist an agency, a manager, or an employee when determining the appropriate course(s) to attend for training.

Prerequisites:

- None

Recommended Audience:

- All State of Ohio Employees

Performance Management Tool for Everyone

Course ID: **PMTE** **ELM Registration Number:** ILT: DAS-PM-004
WBT: DAS-PM-003

Course Delivery: Online or Classroom / System Training

Course Duration: ½ Day

Course Description:

Preparing employees to participate in the performance evaluation process is the key focus of this course. Employees will learn how the current performance evaluation process has been built into the new system tool and the importance of being an active participant in their performance evaluation. They will be introduced to the ePerformance electronic template, understand its various components, learn how to set their performance goals and objectives, view their competencies, and understand the rating model. Employees will also learn how to access and view their current performance documents, acknowledge or deny a performance evaluation, and add comments and/or attachments all within the new system tool.

An overview of the employee Career Development Plan and Performance Improvement Plan process will also be discussed.

Prerequisites:

- General Overview of ePerformance

Recommended Audience:

- All State of Ohio Employees

Using ePerformance for Self-Evaluation (Agency Determined)

Course ID: **PMSE** **ELM Registration Number:** DAS-PM-011

Course Delivery: Online / System Training

Course Duration: 45 Minutes

Course Description:

This course is designed specifically for agencies using the employee Self- Evaluation as part of the agencies overall performance evaluation process. Using the new system, employees will learn where a self-evaluation is incorporated within the evaluation process, how to create a self-evaluation, and how it becomes available for their supervisor or manager to review.

Prerequisites:

- General Overview of ePerformance

Recommended Audience:

- All employees within an Agency using the Self-Evaluation functionality. Employees within an agency not administering the Self-Evaluation process do not need to attend.

For Supervisors and Managers:

Performance Management Tool for Supervisors (PMTS)

Course ID: **PMTS** **ELM Registration Number:** ILT: DAS-PM-006
WBT:DAS-PM-005

Course Delivery: Classroom / System Training

Course Duration: 1 Day

Course Description:

This course begins with an ePerformance demonstration that illustrates how the system works from the beginning of the performance evaluation process to completion. Managers/Supervisors will gain an understanding of the complete performance evaluation process, where workflow impacts the process, and how to complete their specific tasks within the system. Managers/Supervisors will be introduced to the ePerformance electronic templates, their components, and how to use them to create performance evaluation documents, performance improvement plans (PIP), and career development plans. Understanding where the various elements of a performance evaluation are located within the system templates, how they are setup to be used, and when to apply them will also be discussed. Elements of the performance evaluation template include: Performance Goals and Objectives, Statewide Competency, Agency Competencies, and the Rating Model.

Prerequisites:

- General Overview of ePerformance

Recommended Audience:

- Supervisors and Managers (Raters)
- Supervisors and Managers (Reviewers)
- Appointing Authority or designee(s) (Approver)

Using ePerformance for Performance Management (Refresher)

Course ID: **PMTS-C** **ELM Registration Number:** DAS-PM-007

Course Delivery: Online / System Training

Course Duration: 2 ½ Hours

Course Description:

This course is a condensed version of the Performance Management Tool for Supervisors **(PMTS)** course and is offered only online. It provides high-level ePerformance information as it pertains to managers and supervisors and is intended to be used as a refresher course, or as reference material for managers and supervisors who have already attended the (PMTS) course. It is not intended to be used as a replacement for course (PMTS).

Prerequisites:

- General Overview of ePerformance

Recommended Audience:

- Supervisors and Managers (Raters)
- Supervisors and Managers (Reviewers)
- Appointing Authority or designee(s) (Approver)

Using ePerformance for Third Party Input (Agency Determined)

Course ID: **PMTP** **ELM Registration Number:** DAS-PM-010

Course Delivery: Online / System Training

Course Duration: 45 Minutes

Course Description:

Third Party Input is the process of nominating an additional manager or supervisor to participate in a performance evaluation by providing comments or feedback. In this course managers will learn the appropriate steps for soliciting third party input, as well as, what to do when they are the recipient of a third party nomination.

Prerequisites:

- General Overview of ePerformance

Recommended Audience:

- Supervisors and Managers (Raters)
- Supervisors and Managers (Reviewers)
- Appointing Authority or designee(s) (Approver)

For ePerformance System Administrators:

ePerformance Administrative Functions

Course ID: **PMAF** **ELM Registration Number:** ILT: DAS-PM-009
WBT: DAS-PM-008

Course Delivery: Classroom / System Training

Course Duration: Two ½ Day Sessions (8 hours total)

Course Description:

This course begins with an ePerformance demonstration that illustrates how the system works from the beginning of the performance evaluation process to completion. Administrators will gain an understanding of the complete performance evaluation process, where workflow impacts the process, and how managers/supervisors complete their specific tasks within the system. They will be introduced to the ePerformance electronic templates, their components, and how to they are used to create performance evaluation documents, performance improvement plans (PIP), and career development plans.

Understanding where the various elements of a performance evaluation are located within the system templates, how they are setup to be used, and when to apply them will also be discussed. Elements of the performance evaluation template include: Performance Goals and Objectives, Statewide Competency, Agency Competencies, and the Rating Model.

At the conclusion of this course administrators will learn the unique tasks that are specific to their system support role. Administrators will understand how to create group templates, transfer a document to a new manager, assign ad-hoc approvers, cancel documents, and how to re-open a document when necessary.

<u>It is important to note that content from the course ‘Performance Management Tools for Supervisors’ is included in this course; therefore it is not necessary for ePerformance System Administrators to attend both courses.</u>

Prerequisites:

- General Overview of ePerformance

Recommended Audience:

- ePerformance System Administrators (Reviewer or Approver)
- Appointing Authority or designee(s) (Approver)

Soft Skill Non-System training courses

Offered by DAS HRD Office of Learning and Professional Development

To register for OLPD classes go to: http://trainreg.das.ohio.gov

For All Employees:

4 in Core: Actively Engaged in My Performance

Course Delivery: Instructor Led

Course Duration: 1 day

Course Description:

Are you actively engaged with your supervisor in managing your performance? Do you want to be more engaged in your performance development? Learn how to collaborate with your supervisor to plan, observe and assess your performance throughout the year. In the session "Actively Engaged in My Performance" you will learn the elements of the performance management process, how to set SMART goals, request and accept feedback in a positive way, and discuss how to achieve more open and constructive communication in boss and peer relationships.

Prerequisites:

- None

Recommended Audience:

- All State of Ohio Employees

For Supervisors and Managers:

Goal Setting

Course Delivery: Instructor Led

Course Duration: 1 day

Course Description:

Goal setting is used by top-level athletes, successful business-people and achievers in all fields. Goal setting is the first, and potentially the most important step, in managing the performance of your employees.

Setting goals gives you and your employees' long-term vision and short-term motivation. It focuses the acquisition of knowledge, and helps you to organize time and resources.

In this supervisor/manager-focused interactive session, you will learn to set S.M.A.R.T., clearly defined goals for your team so you can measure the achievement of those goals, and ultimately manage your team's performance.

Prerequisites:

- None

Recommended Audience:

- All State of Ohio Exempt Employees

Writing and Giving a Performance Review

Course Delivery: Instructor Led

Course Duration: 1 day

Course Description:

Do you dread writing and giving a performance review? If so, you are not alone. Managers and employees everywhere have come to dread the performance review process, but it doesn't have to be this way.

Attend this supervisor/manager-focused interactive session to obtain tips and advice on making the performance review process easier on both you and your employees. From goal-setting, to documentation, to writing the review, we will help you put all the pieces together to ease the strain of performance reviews. Done right, you may find the performance review process to be constructive and satisfying.

Prerequisites:

- None

Recommended Audience:

- All State of Ohio Exempt Employees

Coaching with Positive Expectations

Course Delivery: Instructor Led

Course Duration: 1 day

Course Description:

You, as a supervisor or manager, are responsible for coaching and mentoring your employees to assist them in reaching their goals and achieving optimal performance. Effective coaching will make your job as a supervisor/manager easier by increasing the employee's competency and job effectiveness.

Join us for an interactive, supervisor/manager-focused session on how to coach effectively for optimum performance. During the session you will learn how to use coaching to reinforce appropriate behavior, teach the employee new skills, motivate employees to pursue higher levels of performance, mentor employees, as well as to correct performance deficiencies.

Prerequisites:

- None

Recommended Audience:

- All State of Ohio Exempt Employees

Redirecting to Improve Performance

Course Delivery: Instructor Led

Course Duration: 1 day

Course Description:

Let's face it. Every manager does it… you put off those difficult conversations just hoping the problems will disappear.

Every manager faces challenging employee behaviors at some point in their career.

Unfortunately, these tough conversations are unavoidable and need to be conducted with finesse, skill and a hearty understanding of what is legal. Because when tough conversations are poorly managed, you risk alienating workers and increase your risk for an employee lawsuit.

With this supervisor/manager-focused interactive session, you will receive practical, hands-on techniques to take the stress out of tough employee discussions. You'll also learn how a well thought-out plan can help you take control of difficult performance discussions and help you and your employee move beyond the anxiety that comes with them.

Prerequisites:

- None

Recommended Audience:

- All State of Ohio Exempt Employees

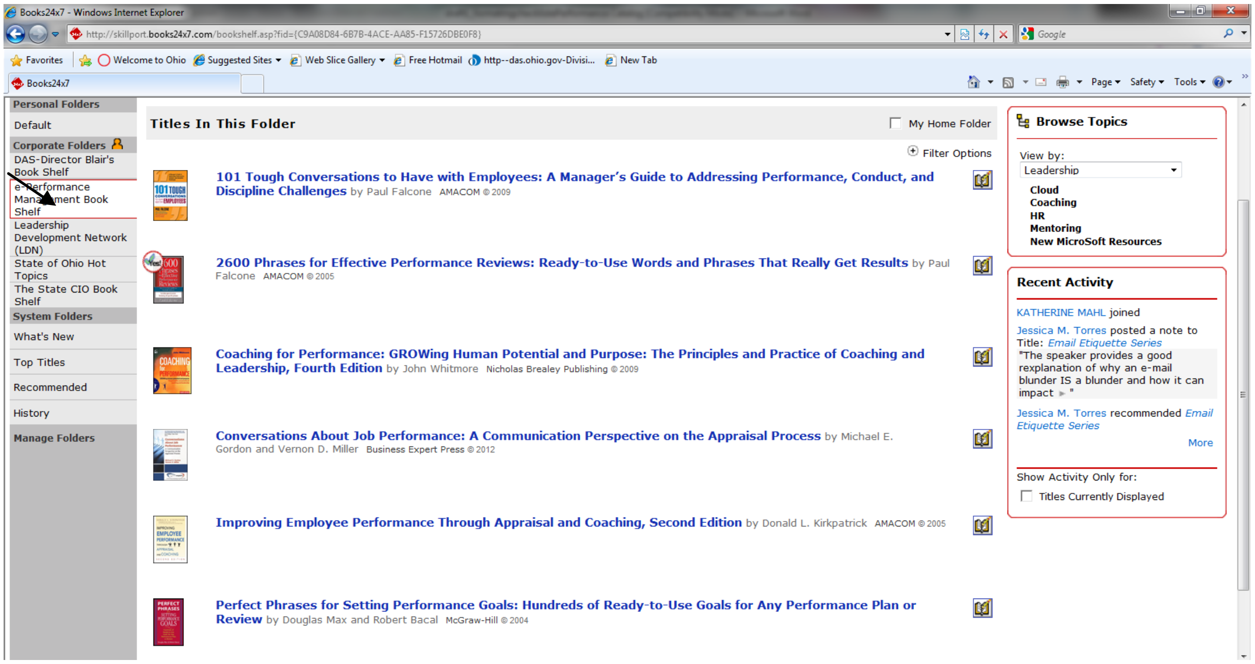
Learn IT Ohio Powered by SkillSoft training courses

Offered by DAS Office of Information Technology (OIT) and Human Resource Division (HRD)

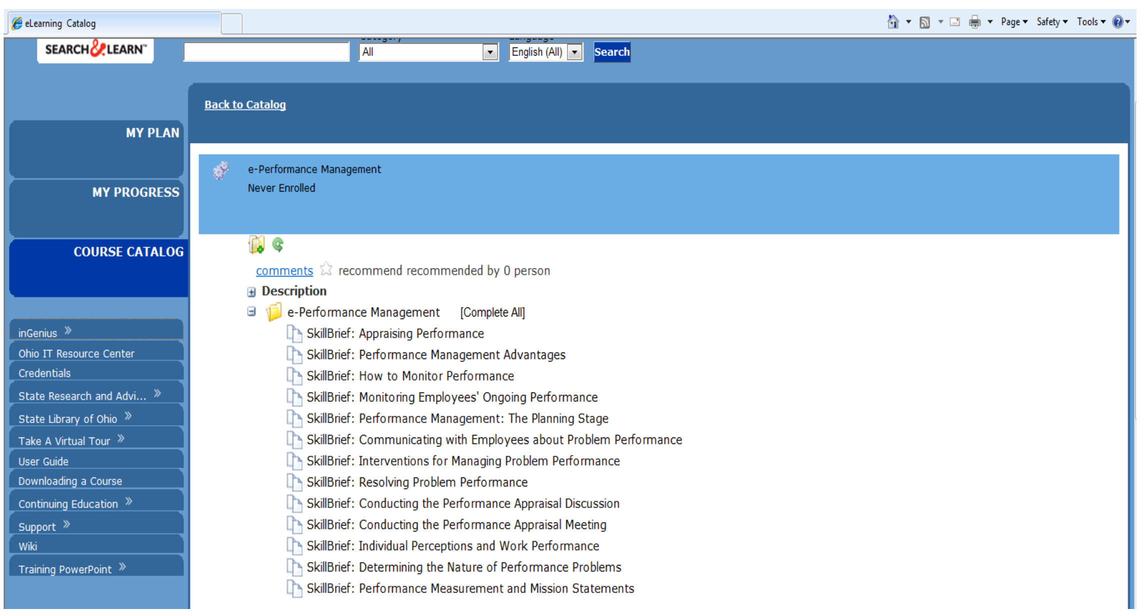
To register go to: https://learnitohio.skillport.com

Learning Asset	Description
Course	Online business skills courseware that incorporates proven learning design methodology for effective and engaging interactive learning. Instructional Features include: **Case Studies, Simulated Dialogs, Audio-enabled learning, Online job aids, Role Play simulated exercises, SkillBrief articles, Pre and Post Tests**
Simulation	Rich multi-path SkillSimulations™ are designed to complement a learning path of courses by providing learners with realistic scenario-based practice in the business subjects being taught
ExecSummaries	ExecSummaries provides summaries of leading business books from today's foremost business authors. ExecSummaries expertly encapsulates the salient points and ideas of full-length books into digestible, eight-page summaries.
ExecBlueprints	ExecBlueprints provides executives with easy-to-absorb practical information and best practices to help provide a framework for taking near-term action on pressing business issues. Authored by top C-level business executives who are regarded as leaders and innovators in their fields, these reports provide nuts and bolts information to help formulate planning and action.
LDC: Quick Talks	Concise, just-in-time, application-based learning from best-selling business authors and leaders! These five minute video learning programs are designed for immediate and contextual application to drive success in the workplace.
JobAid	Job aids are performance support tools that complement learning and assist in the use of knowledge and skills in the workplace. *Job aids are included in all Skillsoft Business Skills courses.*
SkillBrief	SkillBrief articles provide concise summaries of key ideas and teaching points within each course topic. *SkillBriefs are included in all Skillsoft Business Skills courses.*
BLT	BLT's - Blended Learning Toolkits offer a variety of tools and activities such as assessments, worksheets, checklists, challenges, ideas for consideration and reference information that enable learners to leverage new knowledge and skills in the reality of the workplace
Book	Books24x7® - provides online unobstructed access to thousands of the latest and best books from today's leading publishers

Description: Book list in *Books24x7* provides online unobstructed access to thousands of the latest and best books from today's leading publishers. There is an established Book Shelf set up with recommended books that support the ePerformance initiative.



Description: SkillBrief articles provide concise summaries of key ideas and teaching points within each course topic. *SkillBriefs are included in all Skillsoft Business Skills courses.*



LearnIT ePerformance descriptions

ePerformance Management Book Shelf descriptions

101 Tough Conversations to Have with Employees: A Manager's Guide to Addressing Performance, Conduct, and Discipline Challenges

by Paul Falcone AMACOM © 2009 (320 pages) *Citation* ISBN:9780814413487

- With proven techniques you can use right away, this solution-oriented book offers realistic sample dialogues to help you facilitate clear, direct interactions with your employees, helping you sidestep potential awkwardness and meet issues head-on.

2600 Phrases for Effective Performance Reviews: Ready-to-Use Words and Phrases That Really Get Results

by Paul Falcone AMACOM © 2005 (253 pages) *Citation* ISBN:9780814472828

- No managerial or administrative task is as universally dreaded as the performance review. This book offers ready-to-use phrases and words, action items, and descriptions you can use to evaluate performance, prepare development plans, and much more.

Coaching for Performance: GROWing Human Potential and Purpose: The Principles and Practice of Coaching and Leadership, Fourth Edition

by John Whitmore Nicholas Brealey Publishing © 2009 (242 pages) *Citation* ISBN:9781857885354

- Providing an in-depth look into unlocking potential to maximize performance, this book describes and illustrates what coaching really is, what it can be used for, when and how much it can be used, who can use it well and who cannot.

Conversations About Job Performance: A Communication Perspective on the Appraisal Process

by Michael E. Gordon and Vernon D. Miller Business Expert Press © 2012 (280 pages) *Citation* ISBN:9781606490747

- Designed to facilitate meaningful and open interaction between employees and their supervisors, this book presents an alternative approach to the performance appraisal process that focuses on communication rather than evaluation.

Improving Employee Performance Through Appraisal and Coaching, Second Edition

by Donald L. Kirkpatrick AMACOM © 2005 (271 pages) *Citation* ISBN:9780814408766

- Packed with ready-to-use forms, instructions and observations on their effective use, this book gives you all the guidance and tools you'll need to implement a genuinely proactive performance management program that gets maximum results.

Perfect Phrases for Setting Performance Goals: Hundreds of Ready-to-Use Goals for Any Performance Plan or Review

by Douglas Max and Robert Bacal McGraw-Hill © 2004 (174 pages) *Citation* ISBN:9780071433839

- This timesaving job aid provides managers with precisely-worded phrases and goals that describe expected future performance from their direct reports.

ePerformance Management SkillBrief descriptions

Appraising Performance

- Learn how to conduct performance appraisal meetings

Performance Management Advantages

- Learn the benefits of performance management.

How to Monitor Performance

- Explore how to monitor performance.

Monitoring Employees' On-going Performance

- Explore how to monitor ongoing employee performance.

Performance Management: The Planning Stage

- Explore how to use planning to improve employee performance.

Communicating with Employees about Problem Performance

- Learn how to communicate about problem performance.

Interventions for Managing Problem Performance

- Learn about the steps for communicating performance issues.

Resolving Problem Performance

- Explore how you can resolve performance problems.

Conducting the Performance Appraisal Discussion

- Explore the stages in an effective appraisal discussion.

Conducting the Performance Appraisal Meeting

- Learn how to conduct performance appraisal meetings

Individual Perception and Work Performance

- Explore the factors that affect work perceptions.

Determining the Nature of Performance Problems

- Explore how to determining the nature of problems.

Performance Measurement and Mission Statements

- Learn about mission statements and performance measurement.

Skillsoft Assets

Listening Essentials: Improving Your Listening Skills

- There are many factors and variables that influence the way we listen. Listening to understand and being able to truly identify what is being said to you is often easier said than done. Internal and external roadblocks can interfere with how we listen and interpret the information communicated to us. In this course, you'll discover how roadblocks such as distractions, emotions, and the way in which we communicate can influence the way we listen and receive messages. The course also covers strategies that you can use to avoid these roadblocks and improve your listening skills. Materials designed to support blended learning activities aligned with this course are available from the Resources Page.

Problem Solving: The Fundamentals

- 'The problem,' says author and psychiatrist Theodore Rubin, 'is not that there are problems. The problem is expecting otherwise and thinking that having problems is a problem.' A problem is a question or situation that presents doubt, perplexity, or difficulty. It's an issue that needs to be corrected or overcome in order to achieve a desired state. Problem solving involves goal-oriented thinking and action in situations for which no ready-made solutions exist. Whether consciously or unconsciously, everybody solves problems relating to their personal or work life every day. However, you can greatly improve your problem-solving effectiveness by gaining a better understanding of the problem-solving process, essential skills, and required competencies, as well as an awareness of the mind traps and pitfalls that impair the process. This course takes you through the essentials of problem solving and explores some of its challenges. Materials designed to support blended learning activities aligned with this course are available from the Resources Page.

Problem Solving: Process, Tools, and Techniques

- In personal and professional settings alike, the interrelated tasks of problem solving and decision making are often encountered. This Challenge Series exercise focuses on the process, techniques, and competencies that help create winning solutions.

Identifying and Managing Customer Expectations

- Understanding your customers' expectations and behaviors is essential to implementing a successful customer-focused service approach. But how do you get to the core of what your customers truly value? This course explores what customers value from a service perspective and how to identify their needs and expectations. It also examines how you can use customer relationship management tools to help identify and manage customer expectations in order to maintain competitive advantage.

Customer-focused Interaction

- Having positive interactions with your customers is one of the most effective ways to ensure you're providing excellent customer service. However, customers' expectations have evolved over time, and so too have customer service strategies. Many organizations are improving their customer relationships and customer satisfaction levels by moving beyond traditional methods of gaining client feedback, such as from customer satisfaction surveys. Instead, these companies are engaging in real-time conversations with their customers through various technologies, such as social media and wireless Internet. And they're integrating customer relationship management

(CRM) with knowledge management to further support and enhance their existing efforts. This course provides insight into the role of social media and mobile technologies in supporting customer-focused service cultures. And it looks at how these technologies can generate a direct and positive impact on an organization’s customer service levels and, ultimately, competitive position.

Developing Your Customer Focus

- Customers have the power – the power of choice. So how can you make it an easy decision for them to choose you and your company? This Challenge Series exercise explores how to know, meet, and anticipate what your customers are looking for.

Customer Service over the Phone

- Can you hear a smile over the phone? When you're providing customer service over the phone – without the benefits of face-to-face interaction with your customer – it can be challenging to establish the right relationship for excellent service. Just like for face-to-face customer service, there are many techniques for service over the phone that can help you to consistently deliver the best customer service. This course covers the basic rules for answering a customer call including greeting the customer and offering your assistance. It includes information on how to make a good impression by listening and using questions to probe for more information, using your tone, and being able to empathize and be sincere with the customer. This course also describes ways of reflecting or adapting to your customer's style. In the end, customer service should focus on how to better serve and benefit the customer. Materials designed to support blended learning activities aligned with this course are available from the Resources Page.

Internal Customer Service

- Do you know who your customers are? In a customer-focused company, everyone knows they are responsible for excellent external customer service, but who meets the needs of internal customers? Whether you realize it or not, when you do things to help other people within your company do their jobs better, you are providing internal customer service. Internal customer service occurs every time you or a colleague requires information or a service from someone else within the company, and the quality of that service often has a huge impact on the overall quality of service delivered to external customers. This course explores who internal customers are, the expectations placed on serving internal customers, and how to treat your coworkers as you would your external customers. Materials designed to support blended learning activities aligned with this course are available from the Resources Page.

Customer Service Confrontation and Conflict

- How do you handle angry and confrontational customers? One of the most challenging, and potentially uncomfortable responsibilities of a customer service person is dealing with angry customers. By following a few simple techniques such as letting the customer vent, and expressing empathy towards the customer's situation, you can usually defuse tense situations without incident. This course explores typical trouble spots in dealing with angry customers, including reasons for customer dissatisfaction and things customer service people should refrain from saying or doing to avoid adding to the customer's frustration. Materials designed to support blended learning activities aligned with this course are available from the Resources Page.

Additional Assets

Interpersonal Communication: Questioning; Listening; and Feedback Skills

- It's almost impossible to be productive today without being an effective communicator. With the essential skills covered in this report, you'll learn how to accurately and effectively receive messages sent to you and send accurate messages to others.

APPENDIX D – STATEWIDE COMPETENCY CATALOG

Competency	Definition
Analyzing Data or Information	Identifying the underlying principles, reasons, or facts of information by breaking down information or data into separate parts.
Assisting and Caring for Others	Providing personal assistance, medical attention, emotional support, or other personal care to others such as patients or inmates (as part of assigned job duties).
Coaching and Developing Others	Identifying the developmental needs of others and coaching, mentoring, or otherwise helping others to improve their knowledge or skills.
Communicating With People Outside the Organization	Communicates with people outside of the organization (agency), representing the organization (agency) to customers, the public, government (federal, other state or local), and other external sources. Information can be exchanged in person, in writing (electronic or hard copy), or by telephone or email.
Communicating with Supervisors, Peers, and Subordinates	Provides information to supervisors, coworkers (peers), and subordinates (staff) by telephone, in written form (electronic or hard copy), or in person.
Controlling Machines and Processes	Using either control mechanisms or direct physical activity to operate machines or processes (not including computers or vehicles).
Coordinating the Work Activities of Others	Getting members of a group to work together to accomplish tasks.
Developing and Building Teams	Encouraging and building mutual trust, respect, and cooperation among team members.
Developing Objectives and Strategies	Establishes long range objectives and specifies the strategies and actions to achieve them.
Documenting/Recording Information	Entering, transcribing, recording, storing, or maintaining information in written or electronic/magnetic form.
Drafting, Laying Out, and Specifying Technical Devices, Parts, and Equipment	Providing documentation, detailed instructions, drawings, or specifications to tell others about how devices, parts, equipment, or structures are to be fabricated, constructed, assembled, modified, maintained, or used.
Establishing and Maintaining Interpersonal Relationships	Developing constructive and cooperative (professional) working relationships with others and maintaining them over time.
Estimating the Quantifiable Characteristics of Products, Events, or Information	Estimating sizes, distances, and quantities; or determining time, costs, resources, or materials needed to perform a work activity.
Evaluating Information to Determine Compliance with Standards	Using relevant information and individual judgment to determine whether events or processes comply with laws, regulations, or standards.
Getting Information	Observes, receives, and otherwise obtains information from all relevant sources.
Guiding, Directing, and Motivating Subordinates	Providing guidance and direction to subordinates (staff), including setting performance standards and monitoring performance.
Handling and Moving Objects	Using hands and arms in handling, installing, positioning, and moving materials, and manipulating things.

Competency	Definition
Selling or Influencing Others	Convinces others to buy merchandise/goods (use services) or to otherwise change their minds or actions.
Staffing Organizational Units	Recruiting, interviewing, selecting, hiring, and promoting employees in an organization.
Thinking Creatively	Developing, designing, or creating new applications, ideas, relationships, systems, or products, including artistic contributions.
Training and Teaching Others	Identifying the educational needs of others, developing formal educational or training programs or classes, and teaching or instructing others.
Updating and Using Relevant Knowledge	Keeping up-to-date technically and applying new knowledge to the job.
Working with Computers	Using computers and computer systems (including hardware and software) to program, write software, set up functions, enter data, or process information.

APPENDIX E – TOOLS FOR COMMUNICATION

HCM Upgrade Overview Video

The HCM Upgrade Overview video depicts the new enhanced self-service functionality is coming to myOhio.gov early next year. The enhanced features will enable state employees to:

- Print formatted online pay stubs
- Print formatted online W2 forms
- Manage performance evaluations online

These exciting changes will allow the Ohio Department of Administrative Services to keep the system technology up-to-date, lower the cost of ownership, automate manual processes, and increase audit capabilities.

The video is located at: http://www.youtube.com/watch?v=XF502RNxN3s

ePerformance Overview

In communicating the ePerformance Overview to your agency via Task 5, the following materials are available for your use. Please use these at your convenience to provide an accurate and consistent message to your agency.

ePerformance Overview Document

Double-click icon below to view document.

Suggested Audience: All Employees

ePerformance Overview Document

Leading Practice Assessment Analysis

Double-click icon below to view document.

Suggested Audience: Mid, Senior, Executive Leadership

Leading Practice Assessment

Movement from Manual to Automated Process

Double-click icon below to view document.

Suggested Audience: Line-Staff and Immediate Supervisors

Movement from
Manul to Automated I

Detailed Process Flow – Probation Review

Double-click icon below to view document.

Suggested Audience: Line-Staff, Immediate Supervisors, HR Staff

Detailed Process
Flow - Probation Revi

Detailed Process Flow – Annual Review

Double-click icon below to view document.

Suggested Audience: Line-Staff, Immediate Supervisors, HR Staff

Detailed Process
Flow - Annual Review

ePerformance Support Contact Sheet

Double-click icon below to view document.

Suggested Audience: Line-Staff, Immediate Supervisors, HR Staff

ePerformance
Contact Sheet.docx

ePerformance Enterprise Learning Management (ELM) Mass Enrollment Communication

Suggested Audience: All ePerformance Users

ePerformance System Training Notification

ePerformance is the new online, self-service tool to be used for initiating and completing performance evaluations. ePerformance will go-live and be available for agency use beginning January 28th when the myOhio OAKS HCM upgrade is complete.

This communication is to inform you that technical system training is available to teach you how to navigate within ePerformance. You will receive further communications from either the Department of Administrative Services, Human Resources Division in conjunction with the Enterprise Learning Management (ELM) staff and/or your agency with more information on where the training is located and when you can attend.

ePerformance Draft ELM Mass Enrollment Communication to Agency Staff

Double-click icon below to view document.

Suggested Audience: Agency ePerformance Users

DRAFT_ePerformanc
eNotification.pdf

Completing and ePerformance Course in ELM

Double-click icon below to view document.

Suggested Audience: Agency ePerformance Users

Completing an
ePerformance Course

Change Agent QA Document

The Change Agent Question and Answer document is a consolidation of all questions asked of the HCM Upgrade Project Team from August through October. Please reference this document to see answers to frequently asked questions as well additional details to questions which may be a little more uncommon.

Change Agent QA
Document