



## Performance Management and Development

# Spotlight for Supervisors

## ePerformance 9.2 Upgrade Information

As of February 2021, the OAKS Human Capital Management (HCM) application, which includes ePerformance, was upgraded from PeopleSoft version 9.1 to 9.2. While the upgrade is predominantly a technical upgrade, you will notice a **refreshed look and feel** to the overall user interface, as well as a few **notable areas of improvement** to ePerformance.



Supervisors and their employees should notice that all ePerformance documents, both past and present, migrated to the new system as part of the upgrade. Supervisors are encouraged to review the newly updated resources and tools available on the [ePerformance Toolkit](#), such as **updated job aids** and **ePerformance 9.2 Frequently Asked Questions**.

A new batch of job aids has been developed, with more to be added in the future. Some of these include: **Accessing View-Only Documents**, **Cloning**, and the **ePerformance Approval Process**.

It is important to note, especially within the new 9.2 environment, that, rather than cloning, **AT LEAST** one employee's **first new document will need to be created from scratch** to successfully incorporate all the new features the upgrade has to offer, as cloning will prevent these changes from occurring. Should you have any additional questions or concerns regarding this upgrade or any evaluation, please **contact your agency's Human Resources office** for assistance.

### Learning on Demand

The resources below are available to assist you in exploring more on **Performance Management and Development**.

- **Goals and Setting Goals** – [Course, 2 hours](#)
- **Polishing Your Feedback Skills** – [Course, 35 minutes](#)
- **Keeping Top Performers Challenged** – [Course, 19 minutes](#)

To learn more about **Performance Management and Development**, visit **Learning on Demand** by following the below instructions.

- Go to [MyOhio.gov](http://MyOhio.gov).
- Sign in with your OH|ID Workforce User ID and Password. User IDs and Passwords are case sensitive. Be sure your caps lock key is off.
- Click **My Workspace**, then select **Launch the OH|ID App Store** and click **Learning on Demand**.

**NOTE:** Please **review and adhere** to your agency's training and development policies, procedures, and guidelines regarding the use of Learning on Demand resources and tools.

### 9.2 HCM ePerformance Upgrade

The resources below are available to assist you in exploring more on the **9.2 Upgrade**.

- **9.2 Frequently Asked Questions** – [PDF](#)
- **Creating a Performance Document & Establishing Performance Criteria** – [PDF](#)
- **Manager (Rater) Evaluates Employee** – [PDF](#)
- **Manager (Rater) Completes Performance Document** – [PDF](#)

### New Features

Some of the new features within the 9.2 upgrade include:

- **Overview Texts** – This descriptive tool provides a brief description of each step within the evaluation process.
- **Performance Notes** – This feature allows supervisors to document performance observations throughout the year directly within ePerformance.
- **Checkpoint** – This optional step within the annual ePerformance templates would typically occur at the midpoint of the evaluation cycle. It allows a supervisor to provide an update to each employee on goal progress.

To learn more about the ePerformance System and its features, visit the ePerformance Toolkit by clicking on the following link: [ePerformance Toolkit](#) or by contacting us at: [ePerformance@das.ohio.gov](mailto:ePerformance@das.ohio.gov).

**Engaging and Developing Talent**