

ePerformance 9.2 Upgrade FAQs

When does the ePerformance 9.2 upgrade go into effect?

The ePerformance 9.2 upgrade will go-live on February 16th, 2021. All State of Ohio employees conducting and receiving performance evaluations through ePerformance will have their evaluations transitioned into the upgraded system upon go-live.

Will all ePerformance documents move to 9.2?

Yes. All documents, regardless of type, will transition as expected.

What changes have been made to ePerformance?

While there have been some minor changes, the overall process for conducting an evaluation remains the same.

Some minor changes you may notice include the removal of the “Mark Review Held” step as well as marking a document “Complete.” Therefore, after an employee “Acknowledges” an evaluation, it is automatically marked “Complete”.

Are there any new features that have been added?

Yes. Some of the new features include:

Overview Texts – Accessed in the upper left-hand corner of an evaluation, this descriptive tool provides a brief description of each step within the evaluation process.

Performance Notes – This feature allows Raters to document performance observations throughout the year within the system.

Checkpoint – This is an optional step within the annual ePerformance templates that would typically occur at the midpoint of the evaluation cycle. It allows a Rater to provide an update to each employee on goal progress.

Will documents created in ePerformance 9.1 adopt the new 9.2 format after go-live?

While the documents will transition into ePerformance 9.2, documents that were created in 9.1 will still adhere to some of the steps and processes that were in place in the former system. Below are some examples of differences you may notice.

- The optional Checkpoint step will not be available.
- During the final stages of the approval and completion process, a Rater must “Request Acknowledgement” from the employee.
- Once acknowledged, the Rater must mark the document as “Complete. “

Documents created from scratch within ePerformance 9.2 will contain all of the new features and will not reflect 9.1 functionality.

Is Cloning still available within ePerformance 9.2?

Yes, the cloning feature is still available.

When creating documents within ePerformance 9.2 for the first time, please **DO NOT** clone a previous evaluation. In order to fully utilize the features of ePerformance 9.2, create a new evaluation from scratch, then feel free to clone that one going forward.

Will the system still send email notifications?

Yes, the system will still provide the expected email notifications. Examples include content updates sent to the employee, approval requests sent the Reviewer, and evaluation acknowledgement notifications.

Why do documents not display within the “View Documents” link?

When ePerformance Administrators access the View Documents link, the system displays a tab or window within your Internet browser. This may not display as expected **due to pop-up blocker settings**, which can be managed within the web address pane. Simply click on the pop-up blocker icon in the right-hand corner and select “**always allow**” to prevent this issue from occurring.

What can I do if I am running into technical issues with ePerformance 9.2?

If there are any difficulties accessing information, or something is not displaying correctly, always start by clearing your cache within your web browser (i.e., deleting your browser history). While Google Chrome is the recommended browser of choice, Microsoft Edge and Firefox are two additional browsers you can try if issues persist.

Why are there steps missing within the Probationary evaluation templates?

Since Supervisors are required to create both a mid-probationary and final-probationary evaluation, the “Checkpoint” and “Finalize Criteria” steps are not needed. Note that all Annual evaluations newly created in 9.2 (e.g., not cloned) *will* contain the “Checkpoint” and “Finalize Criteria” steps.

I have noticed that there are quite a few Document and Approval Statuses used within an evaluation. What do these mean or signify?

These statuses detail specific points and milestones during a review cycle and can be found within the header portion of each evaluation document.

Document Status List for 9.2		
Document Status	Status Abbrev.	Description
Acknowledged	Acknowledge	Employee has acknowledged the evaluation within the system
Shared with Employee	Share	The Manager Rater has made the evaluation available for review after the approval process
Canceled	Canceled	The evaluation has been canceled and will no longer appear within a Rater's Current Document's queue
Completed	Completed	The evaluation has been finalized and no further action required
Define Criteria	Def Criter	The evaluation has been created and the Manager Rater has begun entering the Criteria (e.g. goals, expectations, measurements etc.)
Evaluation in Progress	In Progress	The Manager Rater has completed the Criteria portion of the evaluation and has begun the rating/commenting process
Not Started	NotStarted	The evaluation has been created but has not had any Criteria entered within the sections
Approval	Aprv	The Manager Rater has submitted the evaluation for the required approvals
Pending Acknowledgement	Pend Ack	The Manager Rater has made the evaluation available for review for the Employee
Track Progress	Track Prg	The Manager Rater has opted to enter material within the Checkpoint step, a new feature within 9.2, rather than skip this section

Approval Status List for 9.2

Approval Status	Status Abbrev.	Description
Approved	Approved	The evaluation has made it through all levels of approval and is currently awaiting action from the Manager Rater to make it available for review
Denied	Denied	The evaluation has been denied by either the Manager Reviewer or HR
Not Required	N/A	The evaluation does not require any approvals, only applicable to an "Executive-Level" Annual Review template
Not Submitted	Not Submit	The Manager Rater has completed the rating portion of the evaluation but has yet to submit for approval
Submitted	Submitted	The Manager Rater has submitted the evaluation and is either awaiting approval from the Manager Reviewer or HR