ePerformance Notifications Technical Guide
Technical Guide

The success of ePerformance’s automatic notifications relies in large part to existing data housed within OAKS’ Human Capital Management (HCM) module. This technical guide will help ePerformance HR Administrators evaluate and improve the email notification process for their agency’s employees.

There are four HCM fields that are critical to email notifications:

1. Email Address
2. Reports To
3. Probation Date
4. Annual Review Cycle Date

Note that these fields may or may not be accessible to an ePerformance HR Administrator depending on the individual’s security settings. If you are not able to perform any of the tasks below, please speak with an appropriate member of your agency’s HR staff.

Email Address

It is imperative that all employees’ email addresses be up to date in OAKS not only to ensure receipt of ePerformance notifications, but to ensure that all communications in general are received. An employee’s email address may be accessed by either the employee or by an appropriate member of the agency’s Human Resources staff.

Employee Updates Email Address

1. Employee navigates to: myOhio > My Info (Person Symbol) > Profile.
2. Click the Email Address link.

3. Review the listed email address(es) and update as necessary. Be sure to indicate a Preferred email address by clicking the checkbox. Click the Save button.
Agency HR Staff Updates Email Address

1. Agency HR Staff navigates to: myOhio > Quick Icons (Four-Square symbol) > HCM > Launch App > Main Menu > Workforce Administration > Personal Information > Modify a Person. Enter the employee’s State of Ohio User ID in the Empl ID field and click the Search button.

2. Click the Contact Information tab.

3. Review the listed email address(es) and update as necessary. Be sure to select a Preferred email address by clicking the checkbox. Click the Save button.

NOTE: Use the “+” button to add secondary email addresses and the “-” button to remove email addresses.
Reports To

The Reports To structure is very important to many OAKS-related functions, including ePerformance and its notifications. If an employee’s Reports To Position Number (PN) is incorrect, notifications will not be sent to the correct Manager (Rater) and, most likely, Manager (Reviewer).

Agency HR Staff Updates Reports To

Please refer to a previously-created Job Aid for detailed, step by step assistance. It may be located by following the below instructions.

1. Agency HR Staff navigates to: myOhio > Quick Icons (Four-Square symbol) > HCM > Go to Site > Resources > Job Aids.

2. Under the Position Management section, click the Job Aid entitled, “Changing Supervisor Position.”
Probation Date and Annual Review Cycle Date

Both the Probation Date and the Annual Review Cycle Date fields may be found on the same HCM screen. These fields are extremely important in the behind the scenes process that sends both the 30 day advance notification for mid and final probationary reviews as well as the 60 day advance notification for annual reviews. If these fields do not contain the proper dates, these notifications will not be sent at the appropriate time.

The **Probation Date** field is used when an employee has recently been hired or promoted. This date reflects the last date upon which the employee is on active probation.

**NOTE**: For purposes of ePerformance notifications, the **Probation Date** field should **never** need updated regardless of the year indicated.

The **Annual Review Cycle Date** field houses employees’ annual performance evaluation due date, which falls on the first date of each calendar quarter (e.g., April 1).

**NOTE**: For purposes of ePerformance notifications, the year indicated in the **Annual Review Cycle Date** field does **not** need updated each year.

Agency HR Staff Populates the Annual Review Cycle Date Field

1. Agency HR Staff navigates to: myOhio > Quick Icons (Four-Square symbol) > HCM > Launch App > **Main Menu** > **Workforce Administration** > **Job Information** > **Job Data**. Enter the employee’s State of Ohio User ID in the **Empl ID** field and click the **Search** button.
2. Click the **Employment Data** link.

![Employment Data Table]

3. Enter the appropriate **Annual Review Cycle** date and click the **Save** button.