

## ePerformance

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## 1. Overview

### What is ePerformance?

ePerformance is UPMC's online performance evaluation process accessible to employees in My HUB. ePerformance emphasizes performance management as an ongoing process, rather than a single, annual event, and reflects the process as a shared responsibility between manager and employee.

Completing the performance evaluation online is a step-by-step process in which employees and managers will have specific tasks to complete. Employees may have different tasks in the process depending on their role in the ePerformance process. [Roles and Definitions overview](#).

### How do I access the ePerformance process?

ePerformance is available to managers and employees via My HUB. Managers access performance documents and other related information for their direct reports from the My Staff section on the Human Resources tab in My HUB. The Performance Management Home page provides resources for preparing, completing, and getting approvals for an employee's performance evaluation. My HUB alerts and notifications will prompt managers and employees at key points in the process. Managers and employees will be able to track the progress of reviews in which they are completing and participating. In addition, other participants, such as peer reviewers, will provide input to the process online via My HUB.

### What additional information is available?

Additional [resources](#) are available to assist in understanding and completing the ePerformance process. Managers are encouraged to review this information prior to beginning the new review process. The ePerformance [Desk Reference](#) and [Checklist](#) are summary guides that will assist managers who already have reviewed these resources to complete the process. The [Manager Overview](#) and [Manager Step-by-Step Guide](#) provide additional information about completing the process.

If the manager wishes to transfer the completion of an employee's review to someone else, the [Transfer Performance Evaluation Step-by-Step Guide](#) provides additional details about this feature.

## **2. Step 1. Alerts and Notification**

### **How will the manager be able to monitor the process?**

Managers have the ability in ePerformance to monitor progress in Document Details. Document Details lists the steps that the manager will complete and the status of each step throughout the process of completing the performance evaluation. As the manager completes each step in the process, Document Details will update to provide a current view of where the manager is in the process.

### **What type of notification will the manager receive during the ePerformance process?**

Managers will receive My HUB alerts and email notifications at key points throughout the process, as listed below. While email notifications are immediate, My HUB alerts are scheduled for overnight processing and are not visible immediately.

Timing of My Hub alerts and email notifications:

- Reminder 45 days before review is due to start the process (My HUB alert).
- When a peer reviewer has completed or declined a nomination to evaluate the employee (email).
- When the employee completes the self-evaluation (email).
- When the employee acknowledges the manager's review (email).
- When the evaluation and merit have been approved (email).
- When an evaluation that was transferred to a designee to complete has been transferred back (email).

While alerts and emails will notify the manager at key points in the process, it is a good idea to also communicate directly with the employee and other participants in the process to set expectations, answer questions, and provide guidance regarding completion of the evaluation.

### **3. Step 2a. Create Performance Document**

#### **What is the required timeframe for validating my employee's job description for the review process?**

If a manager has not validated the employee's job description within the last 320 days, he or she will be required to do so before starting the employee's review. Within ePerformance the manager will be provided a link to go to the job validation process without exiting the review process. Managers are able to validate the employee's job description at any time from the Manager Home page in My HUB (Validate Job Description in the Position Management and Recruitment section of this page).

#### **What if the employee's job description is not correct or needs to be updated?**

Contact your local Human Resources representative for assistance with job description changes or updates.

#### **4. Step 2b. Establish Evaluation Criteria**

##### **What are evaluation criteria?**

The individual sections of the performance review document contain the criteria the manager will use to evaluate the employee's performance: Systemwide Values (50%), Goals (25%) and Job Responsibilities (25%). The Systemwide Values will automatically populate into the review. The manager determines which goals and job responsibilities to include in the review. Goals from the employee's last review will pull into the new document created by the manager if the manager created them. In addition, if department specific goals have been established that overlap with the employee's review period, they will also pull into the new document. Job responsibilities will populate from the job description. The manager is able to edit/add goals and job responsibilities.

##### **I am creating a performance document for my employee. In the responsibilities section, I deleted two responsibilities for this review. Why didn't the job responsibilities automatically renumber?**

The number associated with each job responsibility in the performance document corresponds to the sequence of the responsibilities in the job description that exists in the HR system. While you can delete a specific responsibility in the review, the job responsibility number is associated with the job description and therefore does not automatically renumber.

##### **How will the employee's goals for this review get into the review document?**

If the manager established future goals in the employee's prior review, those Individual goals will automatically populate into the employee's current review document. If not, the manager can add them for the current review. If department specific goals have been established that overlap with the employee's review, they will also pull into the employee's current review document. The employee must be evaluated on at least one goal, and it can be either an individual or department goal.

#### **4. Step 2b. Establish Evaluation Criteria (continued)**

##### **Can I weight the individual sections of the employee's review?**

The individual goals and job responsibilities in these sections of the employee's review can be weighted. If the manager chooses to do this, the weightings for each section must total to 100 percent and they must be entered as a whole number (33 percent, not 33.33 percent). Error messages will appear if weightings are used and they do not total correctly. Example: The employee has three responsibilities. Therefore each responsibility must be weighted by 1/3 (33 percent, 33 percent and 34 percent) in order for the weightings in this section to total 100 percent.

All department goals are required and cannot be edited or removed from the evaluation. The manager can assign a goal a weight of 0% if it is not relevant for the review.

## **5. Step 3a. Nominate Peer Reviewers**

### **Can a manager bypass this step?**

Getting feedback from other reviewers is an optional process, so it will not be required when a manager completes an employee's review in ePerformance. If a manager chooses to request feedback, he or she can do so using the online tools available in ePerformance.

### **What is the difference between a Peer (Values/Duties/Goals), Peer (Values and Duties), and a Peer (Values Only) review?**

The Peer (Values/Duties/Goals) reviewer will evaluate the employee on all sections of the performance document: Goals, Job Responsibilities, and Systemwide Values. A Peer (Values and Duties) reviewer will evaluate Job Responsibilities and Systemwide Values, but not goals. A Peer (Values Only) will evaluate the employee on only the Systemwide Values.

A Peer (Values/Duties/Goals) review might be useful when a manager may not have an opportunity to directly supervise an employee, but there is a designated person in charge who can provide direct feedback regarding the employee's performance. In this instance, feedback would be helpful on all aspects of the employee's review. Another example might be when an employee transfers into the department during the review year and the new manager would like feedback from the prior manager on all aspects of the employee's performance.

A Peer (Values and Duties) review might be used when a manager would like feedback from a co-worker or project team member who may not know what the employees' goals are.

A Peer (Values Only) might be used when a manager would like feedback only about the employee's performance relative to the Systemwide values.

### **5. Step 3a. Nominate Peer Reviewers (continued)**

#### **What is the difference between a peer reviewer and transferring an evaluation to someone else to complete?**

A peer reviewer is someone the manager nominates to provide input to an employee's evaluation they are completing. Transferring an evaluation is an option the manager can use to temporarily transfer ownership of an employee's evaluation to a designee (delegate) to complete. The designee (delegate) is someone with first-hand knowledge about the employee's job and performance. The designee is responsible for obtaining feedback about the employee's performance, evaluating the employee on the performance criteria, completing the evaluation document, and returning it to the manager. Note that the manager maintains overall responsibility for completing the employee's performance evaluation.

[Transfer Document Information](#)

#### **Are there a recommended number of peer reviewers to nominate?**

Peer reviews are optional. If a manager chooses this option, he/she can nominate those who can provide appropriate feedback on the employee's performance.

#### **Is there a limit to the number of peer reviewers I can nominate?**

There is no limit to the number of peer reviewers a manager can nominate to provide feedback about an employee's performance.

#### **A manager has selected a peer reviewer, but is not able to click on the Submit button, why?**

In order to submit peer reviewer nominations, the manager may need to return to the Document Details page and make sure that the Establish Evaluation Criteria activity is complete. This step must be finalized before submitting peer and delegate nominations.

#### **Someone accidentally declined a peer reviewer nomination. Can the nomination be resubmitted?**

Yes, click on the Edit link to the right of the Track Nominations activity. If the status of the nomination is Declined, the manager can click on the Resubmit button to the right to submit the nomination again.



## **6. Step 3b. Review Peer Evaluations**

### **Why does the “Nominate Peer Reviewer” step in the Document Details always show as “In Progress?”**

The manager is able to nominate and review feedback from peers and delegates throughout the performance review process. This step is not completed until the manager completes the overall review.

### **Will the employee be able to see the peer reviewer’s evaluation?**

No. Only the manager will be able to view the evaluation that a peer reviewer completes. The manager will be able to see all sections of the peer review, including the ratings. In addition, the manager also will see a “rolled up” average rating on each evaluation criteria for all peer reviewers who evaluated the employee on the criteria.

## **7. Step 3c. Review Self-Evaluations**

### **Does the manager receive notification when the employee completes a self-evaluation?**

Yes. When the employee completes the self-evaluation, an email notification will be generated and sent to the manager as an alert that this step has been completed by the employee. Because the self-evaluation is not mandatory, it is a good idea for managers to determine and discuss how this step will be handled before the review process begins.

### **How will the manager be able to review the employee's self-evaluation?**

Once the employee has completed the self-evaluation, the manager will be able to open it and review it online. In addition, the manager can copy comments that the employee has provided directly into the manager evaluation using the Writing Tools feature in ePerformance.

### **How long will the employee have to complete the self-evaluation?**

The self-evaluation is optional. If the self-evaluation is completed, the employee will be able to see the online document immediately after the manager completes Step 2 in the process — creating the performance document and criteria. The manager and employee should discuss the timeline of the review process shortly after the manager is alerted that the review is due. The [ePerformance Checklist](#) provides guidance about the overall timeline for completing a review on time.

## **8. Step 4a. Complete the Manager Evaluation**

### **Can the employee see the evaluation the manager is working on before it is complete?**

While the employee will be able to see their self-evaluation, they will only be able to view the manager's completed evaluation after the manager makes it available to them to do so. The manager will make the review available to the employee to review and acknowledge that it was discussed. The manager can choose to do this either before or after the review meeting is held with the employee.

### **I am in the evaluation document for my employee — how do I navigate through it?**

The review document can be lengthy, depending on the number of individual goals and job responsibilities the manager selects as evaluation criteria. The manager can expand and collapse sections of the document to make it easier to view on screen.

### **When should the review document be saved?**

It is a good idea for the manager to save the evaluation document frequently while working in it to avoid timing out and losing anything that has not been saved. The manager should look for Save buttons at the top and bottom of the evaluation document. Save icons also have been placed within each evaluation item. Saving the document does not change the status of the document process — it just saves the content of the document the manager has completed. The manager is able to go back into the document at any time while the review is in progress.

### **How do you verify that managers reviewed and confirmed that the employee completed all mandatory requirements, such as required training and department-specific competencies?**

While the manager will indicate that the employee has completed mandatory requirements in ePerformance, the process of verifying that this is true remains a responsibility of the individual departments. In most cases this is done via reporting or manually.

### **When can the employee see the completed performance review?**

The manager controls when the completed review is available for the employee to review and acknowledge. The manager has the flexibility to make the review available to the employee before or after the review meeting is held. There is a specific step in the process for the manager to make the review available to the employee to review and acknowledge. The manager also can provide a printed copy of the review to the employee or review it with the employee online during the review meeting.

## **8. Step 4a. Complete the Manager Evaluation**

### **How is the employee's overall performance rating determined?**

The manager will evaluate the employee on each performance criterion. The ratings will be selected from a dropdown box within the review. The manager is able to see a consolidated rating at the end of each section, such as Goals, Job Responsibilities, and Systemwide Values. In addition, the manager will be able to see a consolidated rating from other reviewers for each criterion evaluated within the review.

The employee's final, overall rating, will be determined in the system based on the ratings the manager selects in all sections of the review. Ratings are descriptive and not numeric.

### **How does a manager determine the merit increase amount based on the employee's overall evaluation rating?**

Submitting the merit increase and completed performance document is a specific step in the ePerformance process the manager will complete. In this step, the manager will select the merit based on the overall rating the employee has achieved. The manager will be provided with the appropriate merit range per current merit guidelines based on the employee's overall performance rating and current pay rate.

## **9. Step 4b. Submitting the Merit Increase and Performance Document for Approval**

### **How does the approval process in ePerformance work?**

The approval step in ePerformance is a request to approve both the performance evaluation and the merit recommendation completed by the manager. The manager will use the existing merit approval process in My HUB and the employee's performance evaluation will be sent along with the manager's merit recommendation. The first approver will be able to review the evaluation, as well as approve the merit recommendation.

### **When will the manager complete the approval step?**

Because the approval step in ePerformance is a request to approve both the performance evaluation and the merit recommendation, the manager submits these for approval *before* conducting the review meeting with the employee.

### **What if a manager submits the review for approval and then needs to make a change to the review ratings or the merit?**

The manager is able to reopen a completed review as long as it has not been finalized. The manager can then make changes in the review document. If the changes result in a change in the overall review rating, the manager will need to resubmit the review and merit recommendation through the review process.

## **10. Step 5. Approvals and Reviews**

**In our business unit, the VP wants to be able to review and provide feedback on each employee's review. Can this be done?**

There is a feature in ePerformance — Forward Review — that allows a manager to forward the review to other management within that area's organization structure. The person to whom the review is forwarded can review and write comments in the performance review, but cannot change the review or the ratings the manager has input.

**How will using the Forward Review feature impact the approval process?**

Using the Forward Review feature provides the opportunity for others within the employee's organization structure to review and/or comment on the review. This is an optional process and a response or comments are not required. The employee's review will not be held up or delayed if the review is forwarded but no comments are provided, or if it isn't reviewed at all.

**How will the manager be able to determine when the performance evaluation and merit recommendation have been approved?**

A manager will receive a workflow email once all approvals have been obtained. Additionally, the manager can view the status of the submitted evaluation and merit any time by going to the Transactions Submitted page from the Manager Home page in My HUB and review the status of the transaction. The status of the transaction will change to "Approved" when the necessary approvals have been obtained.

## **11. Step 6. Conducting the Review Meeting and Completing the Process**

### **After the review and merit have been approved, what are the next steps?**

Once the manager has confirmed that the review and merit are approved, the manager is able to meet with the employee to discuss the evaluation and complete the process. There are several steps to complete, which include making the review available to the employee (either before or after the review meeting) so they can review and acknowledge it, and then finalizing the review so the merit (if applicable) can be processed.

### **How does the manager make the review available to the employee?**

The manager controls when and how the completed review is available for the employee to review and acknowledge. The manager has the flexibility to make the review available to the employee either before or after the review meeting is held. The manager also can provide a printed copy of the review to the employee or review it with the employee online during the review meeting. The manager can select the printer symbol in the performance evaluation to bring up a PDF version of the review document. The PDF document can be printed or saved but not changed.

### **When will the manager conduct the review meeting with the employee?**

The manager will meet with the employee to discuss the performance evaluation after obtaining all reviews and approvals. When meeting with the employee, the recommendation is for the manager to have printed the evaluation and review it with the employee. The online document is the official review of record as it has the employee's electronic signature and the manager's electronic approval.

### **How will the HR system know if a review meeting was held?**

The employee confirms that the review meeting was held at the time they acknowledge the review. Additionally the manager confirms that the review meeting was held at the time they finalize the evaluation process.

## **11. Step 6. Conducting the Review Meeting and Completing the Process (continued)**

### **When does the employee acknowledge their review?**

The employee is able to acknowledge their review and provide comments after the manager makes the review available to the employee to see. The manager can complete this step either before or after the review meeting is held. However, the employee should acknowledge the evaluation only after the review meeting has been held with the manager. During the review meeting, it is a good idea for the manager to remind the employee to acknowledge the review and ensure the employee knows how to acknowledge their review in My HUB.

### **How does the manager finalize the review?**

After the review meeting is held and the employee electronically acknowledges their review, the manager updates the status of the review in Document Details by selecting "Mark Complete." The manager will be prompted to confirm that they want to finalize the employee's review. When the manager confirms that they are ready to mark the review complete, the review no longer can be changed or edited. The manager will be able to see reviews they have completed in View Performance Documents from the Performance Management Home page.

### **When does the merit get processed in the HR system?**

Once the manager marks the review complete, the review is finalized and cannot be changed. In addition, the merit that has been approved is processed in the HR system overnight.

### **Do I need to notify my HR area that I have completed the employee's performance review?**

Because the entire review is completed online, there is no editing that is needed on the back end of the process to check for errors in calculating the merit or totaling the performance rating. Your HR area will be able to use reports and queries to review performance data.