

ePerformance

Step-by-Step Help Guide for Employees

1. [Overview](#)
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REVISED: April 2015

1. Overview

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.

In the ePerformance process, the employee provides feedback to the manager regarding their own performance results by completing a self-evaluation online (optional), providing comments in the final review shared by the manager, and acknowledging their review online via electronic signature.

Preparation Tips:

- Discuss with your manager the steps you will complete in the process and if you will complete the self-evaluation.
- Review the ePerformance resources about completing the process.
- Review your previous evaluation, notes, and identify major areas of achievement and development opportunities during this review period.
- Review your job description and identify anything that needs updating.
- Review instructions about how to access ePerformance and acknowledge your review electronically.

ePerformance Resources for Employees

Additional [resources](#) are available to assist in understanding and completing the ePerformance process. ePerformance [Roles and Definitions](#) list the various roles an employee may have in the process. The ePerformance [Checklist](#) provides a timeline for completing the review on time. The [Employee Overview](#) and [FAQ for Employees](#) provide additional information about completing the process. A list of [Success Tips](#) may help the employee complete the process effectively.

Other Resources

Peer Evaluations: [Overview](#) | [Step-by-Step Instructions](#) | [Frequently Asked Questions](#)

If you are designated by a manager to complete a performance review of another employee on the manager's behalf, the [Transfer Performance Evaluation Step-by-Step Guide](#) provides additional details about this feature.

1. Overview (continued)

Performance management resources are available to employees from the Human Resources page in My HUB. To go to the Employee Performance Evaluations Home page, select the “View performance review information” link in the My Profile section of the Human Resources page.

The screenshot displays the My HUB interface for Human Resources. At the top, a navigation bar includes links for Welcome, Human Resources, Kronos, Financial Reporting, Home, Quick Links, Feedback, and Sign out. Below this, the page is organized into several sections:

- My Payroll:** Includes links for View update payroll information, View payslip, and Bank accounts.
- My Benefits:** Includes links for View benefits information, Benefits enrollment, My benefits summary, Online benefit confirmation, MyHealth OnLine (Medical/Dental/FSA), My retirement, and My voluntary benefits.
- My Profile:** This section is circled in red. It contains links for View update personal information, View job information, View performance review information (highlighted with a red arrow), Disaster preparedness profile, and COI.
- My Total Compensation:** Includes a link for Total compensation statement.
- View UPMC Jobs:** Includes links for View update recruitment information and View job postings and apply.
- uLearn:** Includes a link for uLearn information.

Additional sections visible include a Leave Summary with PTO and Hours, Alerts and Confirmations (notifying of a peer review request), and a banner for Critical Illness and Universal Life enrollment.

1. Overview (continued)

The Employee Performance Evaluations Home page contains various resources about the ePerformance process and links to complete the process.

In the Performance Evaluations section of the page the employee can select links to access information about the review process, see their current and past performance reviews, view their job description, and participate as a peer reviewer in another employee's review when nominated by a manager.

In the Performance Management section, the employee can review information about completing a performance evaluation transferred by a manager, view a listing of performance documents that have been transferred, and transfer the evaluation back to the manager.

Employee Performance Evaluations Home

Performance Evaluations	
Employee Overview	Peer Overview
Current Performance Document View status, complete self-evaluations, and verify the final review document when requested.	Peer Review Requests Accept or deny a request to complete a peer evaluation for which you have been asked to complete.
Past Performance Reviews View your past performance review documents for reviews due after June 6, 2010.	Peer Reviews to Complete Start a peer evaluation or complete a peer evaluation already in progress. You must first accept the peer review request before completing a peer evaluation.
View your Job Description	Peer Reviews you have Completed
View your Departmental Goals	

The left side of the Performance Evaluations section is where the employee can see an overview of the process, view current and past self-evaluations, view their job description, and view departmental goals.

The right side of the Performance Evaluations section contains links about peer reviews.

Performance Management	
Performance Management Overview This section is available for employees who have been transferred responsibility to complete a performance evaluation on the manager's behalf.	Transfer Document Transfer responsibility for a performance evaluation back to the manager for completion.
Performance Documents View a listing of performance documents that are in progress that you are responsible for completing.	

Go To: [Employee Home](#)
[Personal Information Home](#)

The Performance Management section contains links about completing reviews that are transferred to another employee to complete. More information is available about the [Transfer Document function](#).

2. Completing the Self-Evaluation

The self-evaluation is optional. It is a good idea for the employee and manager to specifically discuss this option at the beginning of the performance evaluation process.

If the employee will complete a self-evaluation, an automatic notification will be sent to the employee after the manager creates the review document. To view and complete the self-evaluation, the employee can select the Current Performance Document link in the Performance Evaluations section of the Employee Performance Evaluations Home page.

Employee Performance Evaluations Home

Performance Evaluations

[Employee Overview](#)

[Current Performance Document](#)

View status, complete self-evaluations and verify the final review document when requested.

[Past Performance Reviews](#)

View your past performance review documents for reviews due after June 8, 2010.

[View your Job Description](#)

[View your Departmental Goals](#)

[Peer Overview](#)

[Peer Review Requests](#)

Accept or deny a request to complete a peer evaluation for which you have been asked to complete.

[Peer Reviews to Complete](#)

Start a peer evaluation or complete a peer evaluation already in progress. You must first accept the peer review request before completing a peer evaluation.

[Peer Reviews you have Completed](#)

Performance Management

[Performance Management Overview](#)

This section is available for employees who have been transferred responsibility to complete a performance evaluation on the manager's behalf.

[Performance Documents](#)

View a listing of performance documents that are in progress that you are responsible for completing.

[Transfer Document](#)

Transfer responsibility for a performance evaluation back to the manager for completion.

Go To: [Employee Home](#)
[Personal Information Home](#)

2. Completing the Self-Evaluation (continued)

The Current Performance Document page is a listing of the employee's current performance documents. To view or complete the self-evaluation, the employee clicks on the link in the Document Type column to open the details of the current performance evaluation.

The screenshot displays the 'Current Performance Documents' page. At the top, there is a navigation bar with links for Welcome, Human Resources, Kronos, Financial Reporting, Home, Supply Chain, Quick Links, Feedback, and Sign out. Below the navigation bar, the page title is 'Current Performance Documents'. A callout box on the right points to the introductory text: 'Listed below are your current performance documents. Click on the Document Type to open the details of the document and continue.' Below this text are three links: 'Click Here to review ePerformance Quick Tips', 'Click Here for additional help.', and 'Click Here for an overview of the performance evaluation process.' The main content is a table titled 'Performance Documents' with the following data:

Employee ID	Document Type	Begin Date	End Date	Job Title	Status	Manager
[REDACTED]	Annual Performance Review	10/22/2010	10/21/2011	Professional Staff Nurse	In Progress	[REDACTED]

A callout box on the left points to the 'Annual Performance Review' link in the table, with the instruction: 'Select the document to view document details and complete the self-evaluation.'

2. Completing the Self-Evaluation (continued)

Document Details lists the activities available to the employee on the performance document. The status of each activity and the actions the employee can take will change as each step is completed.

When the employee's manager has completed the first activity, Establish Evaluation Criteria, the employee is able to see their self-evaluation and the criteria on which they will be evaluated by selecting the View link. The employee can only view the criteria and not change them. The employee begins their self-evaluation by selecting the Start link in the Action column next to the Complete Self Evaluation activity.

The screenshot displays the 'MY HUB' interface for performance document management. At the top, there are navigation tabs for 'Welcome', 'Human Resources', 'Kronos', 'Financial Reporting', 'Supply Chain', and 'IMS'. Below these is a 'Performance Document History' section with a 'Document Details' link. The 'Document Details' section shows information for an 'Annual Performance Review' from 12/12/2011 to 12/11/2012. The 'Performance Document Details' section lists: Employee (redacted), Job Title (redacted), Document Type: Annual Performance Review, Period: 12/12/2011 - 12/11/2012, Template: Employee Review Template, Document ID: 117416, Manager (redacted), and Status: Completed. The 'Document Progress' table is as follows:

Activity	Status	Due Date	Action	Next Action
Establish Evaluation Criteria	✓ Completed	12/11/2012	View	
Complete Self Evaluation	○ Not Started	12/11/2012	Start	
Review Manager Evaluation	○ Not Started	12/11/2012		

At the bottom of the page, there is a link: [Return to Select Documents](#). Two callout boxes provide instructions: one points to the 'Document Details' section, stating 'Review Document Details: Information about the performance document, including template type and overall status of the review.' The other points to the 'Start' link in the 'Complete Self Evaluation' row, stating 'Click the Start link to view and complete the self-evaluation.'

2. Completing the Self-Evaluation (continued)

The employee has the opportunity to evaluate their own performance by completing the self-evaluation document. The self-evaluation contains the UPMC Mission and Vision, the evaluation criteria to be evaluated, and an overall summary section. The employee evaluates their own performance on the Systemwide Values, Goals and Job Responsibilities. The Goals section may include individual goals and department specific goals, as appropriate.

The screenshot shows a web interface for a self-evaluation document. At the top, there are navigation tabs: Welcome, Human Resources, **Kronos**, Financial Reporting, and Supply Chain. Below the tabs, the page title is "Performance Document - Annual Performance Review". The main heading is "Self Evaluation". The document is for "Environmental Services Aide" and covers the "Annual Performance Review: 07/15/2014 - 07/14/2015". The author is "Environmental Services Aide" and the role is "Peer (Values/Duties/Goals)". The status is "In Progress" and the due date is "07/14/2015".

A note states: "Although the self-evaluation is voluntary, non-exempt employees must complete it during scheduled work time." It also says: "When finished updating the evaluation, click the Complete button to make the document available to the requesting manager. Only the requesting manager will be able to see your evaluation." A red reminder says: "Remember to save frequently. Click Here for additional help."

The document content includes "Our Mission" (UPMC's mission is to serve our community by providing outstanding patient care and to shape tomorrow's health system through clinical and technological innovation, research, and education.) and "Our Vision" (UPMC will lead the transformation of health care. The UPMC model will be nationally recognized for redefining health care by:).

- Putting our patients, health plan members, employees, and community at the center of everything we do and creating a model that ensures that every patient gets the right care, in the right way, at the right time, every time.
- Harnessing our integrated capabilities to deliver both superb state-of-the-art care to our patients and high value to our stakeholders.
- Employing our partnership with the University of Pittsburgh to advance the understanding of disease, its prevention, treatment and cure.
- Serving the underserved and disadvantaged, and advancing excellence and innovation throughout health care.
- Fueling the development of new businesses globally that are consistent with our mission as an ongoing catalyst and driver of economic development for the benefit of the residents of the region.

At the bottom, there are buttons for "Save", "Complete", and "Return to Document Detail". There are also expand/collapse controls for sections: "Expand All", "Collapse All", and "Expand Sections". The sections listed are: "Section 1 - Values", "Section 2 - Goals", "Section 3 - Responsibilities", and "Section 4 - Overall Summary".

Save your work: Save frequently by clicking the Save button.

Complete the review: Click the Complete button only when the review is done and ready to submit to the manager. After the self-evaluation is complete, the employee cannot edit the document.

Document view: Click "Expand" and "Collapse" to control your view of the document.

2. Completing the Self-Evaluation (continued)

The employee completes the self-evaluation by rating their own performance on each criterion in the review and providing comments where applicable. Completing a self-evaluation is an optional process, so there are no required sections within the review document. The employee selects a rating from the rating dropdown box in each criterion of the document. Comments can be entered in the comments section to provide additional detail regarding specific criteria.

The Save button will save the document and the information the employee has entered. It is a good idea to click the Save button frequently. The Complete button will begin the process of finalizing the employee's self-evaluation and should be selected only after the employee is done with the self-evaluation.

The screenshot displays the 'Section 2 - Goals' interface. At the top, there are links for 'Expand All', 'Collapse All', and 'Expand Sections'. Below this, 'Section 1 - Values' is expanded, and 'Section 2 - Goals' is collapsed. Under 'Section 2 - Goals', there are 'Expand' and 'Collapse' buttons. A goal titled 'FY2016-2020 Goal 1' is shown with a 'Description' field containing text about a SMART format goal. Below the description is a 'Rating:' dropdown menu and a 'Weight:' field set to '0 %'. At the bottom of the goal section is a 'Goals Summary' section with a 'Rating:' field and a 'Comments:' text area. A red circle highlights a spell check icon (a book with a checkmark) in the top right corner of the comments text area.

Click on ratings to view and select the rating category for each goal that is evaluated. Click on the list icon to see a full description of each performance rating category.

Comments can be provided at the end of each section. Comments are optional. Click the spell check (book) icon to use this tool for spelling suggestions.

2. Completing the Self-Evaluation (continued)

After evaluating their own performance, the employee can provide an overall summary of their performance in the comments section at the end of the review document. The employee clicks on Complete when finished with the review and ready to submit it to the manager.

Note: The self-evaluation does not need to be completed all at once. The document can be reviewed and edited multiple times until the employee is ready to complete and submit it to the manager.

The screenshot shows the 'Self-Evaluation' page in a web browser. At the top, there is a navigation bar with 'Home', 'Quick Links', 'Supply Chain', and 'IMS'. Below the navigation bar, the page title is 'Performance Document - Annual Performance Review' and 'Self-Evaluation'. The page displays the review period 'Annual Performance Review: 12/12/2010 - 12/11/2011', the author's name, role 'Employee', status 'In Progress', and due date '12/11/2011'. A green checkmark indicates 'You have successfully saved your evaluation.' Below this, there is a note about voluntary self-evaluation and instructions to save frequently. At the bottom of the page, there are three buttons: 'Save', 'Complete', and 'Return to Document Detail'. The 'Complete' button is circled in red. Three callout boxes with arrows point to the 'Complete' button and the 'Return to Document Detail' link, providing instructions on when to use them.

Confirmation that the evaluation was saved

Select "Complete" when finished with the self-evaluation and ready to finalize and submit it to the manager

Return to Document Detail: Go back into the list of activities for the performance document

2. Completing the Self-Evaluation (continued)

The employee will confirm that the self-evaluation is complete. Selecting the Complete button will finalize the document and alert the manager that it is completed. The Cancel button will return the employee to the self-evaluation document.

MY HUB
The source for UPMC human resources & financial data.

Welcome | Human Resources | Kronos | Financial Reporting | Home | Quick Links |
Supply Chain | IMS

Performance Document - Annual Performance Review

Complete Evaluation

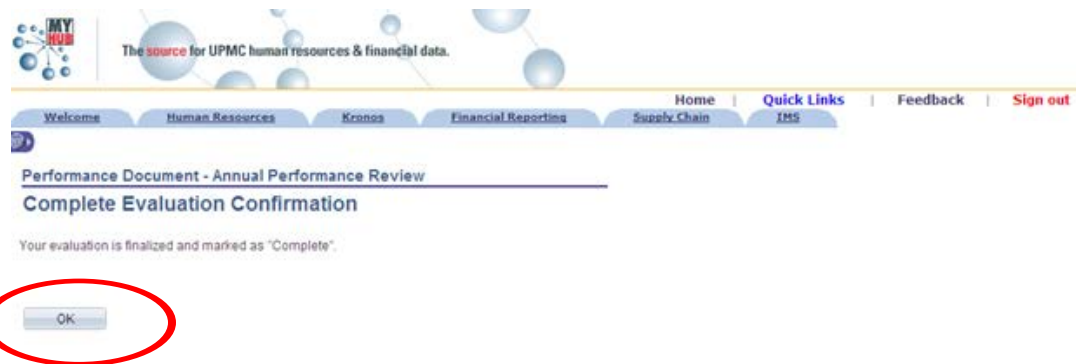
You have almost finalized your evaluation. If you have no further changes, click the Complete button at the bottom of this page.

Once you click Complete your evaluation will be finalized and sent to your manager for review.

Select Complete when done with the self-evaluation and ready to submit it to your manager. After clicking Complete, the self-evaluation is final and cannot be edited.

2. Completing the Self-Evaluation (continued)

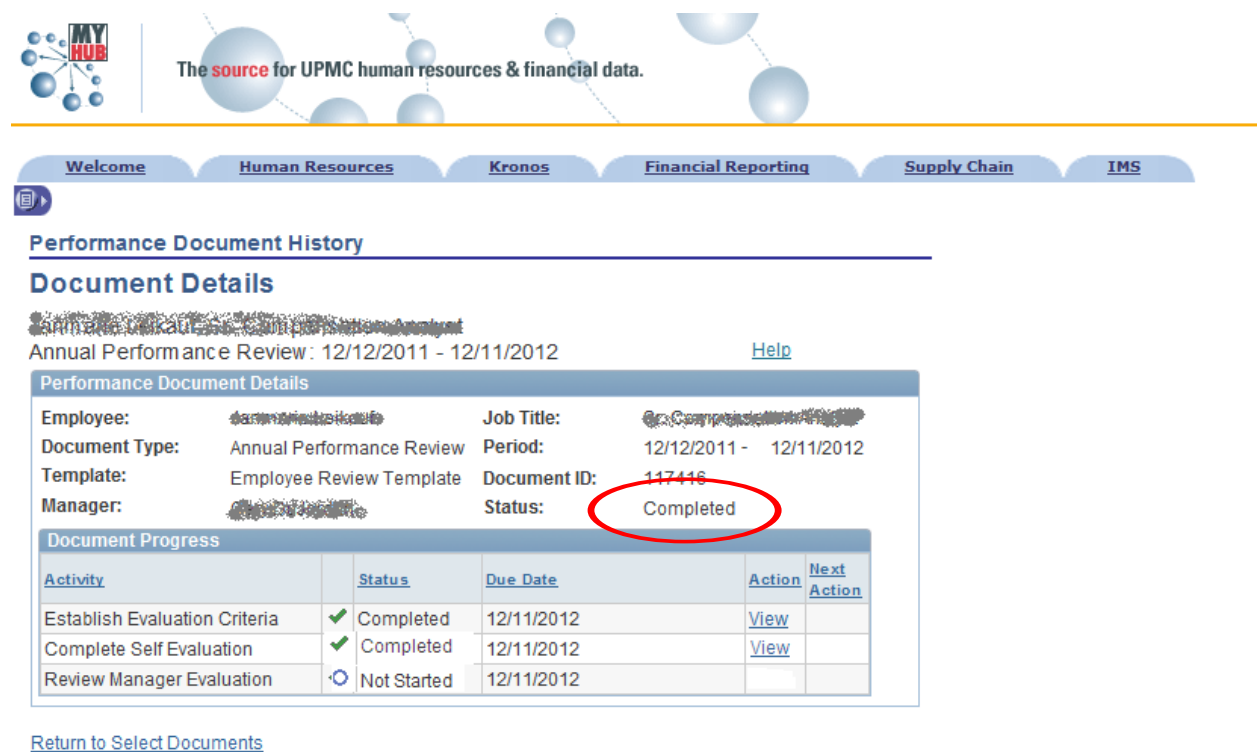
A confirmation will appear indicating that the self-evaluation is finalized. When the employee finalizes the self-evaluation, they will be able to view the document but not edit it. The employee's manager will be notified that the self-evaluation has been completed. It also is a good idea for the employee to let their manager know that they have finished the self-evaluation. Click the OK button to exit the confirmation page.



2. Completing the Self-Evaluation (continued)

The employee can verify that the self-evaluation activity is complete in Document Details.

The next activity in the process, Review Manager Evaluation, will become available to the employee when the manager makes the manager's review available to the employee. It is a good idea for the employee to discuss with the manager when in the process they will be able to see the manager's evaluation and go into the evaluation to review and acknowledge it.



The screenshot displays the MY HUB interface. At the top, there is a navigation bar with tabs for Welcome, Human Resources, Kronos, Financial Reporting, Supply Chain, and IMS. Below the navigation bar, the page title is "Performance Document History". The main content area is titled "Document Details" and shows information for an "Annual Performance Review: 12/12/2011 - 12/11/2012". A "Help" link is visible. The "Performance Document Details" section includes fields for Employee, Job Title, Document Type, Period, Template, Document ID, and Manager. The "Status" field is circled in red and shows "Completed". Below this is a "Document Progress" table with columns for Activity, Status, Due Date, Action, and Next Action.

Activity	Status	Due Date	Action	Next Action
Establish Evaluation Criteria	✓ Completed	12/11/2012	View	
Complete Self Evaluation	✓ Completed	12/11/2012	View	
Review Manager Evaluation	○ Not Started	12/11/2012		

[Return to Select Documents](#)

3. Review Meeting and Completing the Process

After the employee's manager has completed the employee's performance review, the manager and employee will meet to discuss the performance results. The manager will make the performance review available for the employee to review either before or after the review meeting is held. When the status of the review is changed by the manager to Employee to Acknowledge, the employee will be able to view the contents of the manager's evaluation online. The employee also will be able to acknowledge the evaluation, but this should only be done once the review meeting with the manager has been held.

Current Performance Documents



Listed below are your current performance documents. Click on the Document Type to open the details of the document and continue.

[Click Here](#) to review ePerformance Quick Tips

[Click Here](#) for additional help.

[Click Here](#) for an overview of the performance evaluation process.

Performance Documents							Customize Find	First	1 of 1	Last
Employee ID	Document Type	Begin Date	End Date	Job Title	Status	Manager				
	Six Month Performance Review	10/15/2012	04/15/2013	Practice Based Core Manager	Employee to Acknowledge					

The employee will receive an email notification when the manager makes the review available to review and acknowledge.

Your manager has completed your Six Month Performance Review document and it is now ready for your review and comments. Once the review meeting has been held, you will be instructed to acknowledge the review through My HUB.

Navigation from the Human Resources tab in My HUB

Click on View Performance Review Information (under My Profile)

Click Current Performance Document

Click Six Month Performance Review > View to view the manager's evaluation and then acknowledge once the review meeting has been held.

Note: Your acknowledgement does not necessarily mean that you agree, but affirms that this review was held and discussed in detail with you.

(Please do not respond to this automatic notification.)

3. Review Meeting and Completing the Process (continued)

Once the status of the document is changed to Employee to Acknowledge, the employee can select the View link to review the completed performance review or Acknowledge to start the activity of acknowledging the review. Note: The employee should only acknowledge the evaluation once the review meeting has been held with the manager.

Current Performance Documents

Document Details

██████████ Practice Based Care Manager

Six Month Performance Review: 10/15/2012 - 04/15/2013

[Help](#)

Performance Document Details					
Employee:	Susan Brandt	Job Title:	Practice Based Care Manager		
Document Type:	Six Month Performance Review	Period:	10/15/2012 - 04/15/2013		
Template:	Employee Review Template	Document ID:	██████████		
Manager:	██████████	Status:	Employee to Acknowledge		
Document Progress					
Activity	Status	Due Date	Action	Next Action	
Establish Evaluation Criteria	✓ Completed	04/15/2013	View		
Complete Self Evaluation	⊙ Not Started	04/15/2013		Start	
Review Manager Evaluation	🟡 Employee to Acknowledge	04/15/2013	View	Acknowledge	

[Return to Select Documents](#)

Tip: The employee can view the manager evaluation if the status of the document is "Employee to Acknowledge."

3. Review Meeting and Completing the Process (continued)

The employee can review the manager evaluation by scrolling through all sections and reviewing what the manager has written. The employee also can see the overall rating at the bottom of the document and enter comments as well.

The employee acknowledges the review after they have met with the manager to discuss it. When ready to acknowledge the review, the employee clicks the Acknowledge Review button in the review document. By acknowledging the review, the employee is indicating they have seen the review and met with their manager to discuss it. Acknowledging the review does not indicate agreement or disagreement with the contents of the review.

The screenshot displays the UPMC MyHub interface. At the top, there is a navigation bar with links for Welcome, Human Resources, Kronos, Financial Reporting, Home, Supply Chain, and Quick Links (IMS). Below the navigation bar, the page title is "Performance Document - Annual Performance Review" and the main heading is "Manager Evaluation". The document details include: "Annual Performance Review: 10/22/2010 - 10/21/2011", "Author: Colleen Edwards", "Role: Manager", "Status: Review Held", and "Due Date: 10/21/2011". A warning box contains the text: "If you have met with your manager to discuss this review, click the Acknowledge button below. Acknowledgement does not indicate agreement or disagreement with the contents of the review. You may also enter comments in the Employee Comments section, if applicable. Click Here for additional help." Below the warning box, there is a row of buttons: "Save", "Acknowledge Review" (circled in red), and "Return to Document Detail". At the bottom, there are links for "Expand All", "Collapse All", and "Expand Sections", followed by a list of sections: "Section 1 - Values", "Section 2 - Goals", and "Section 3 - Responsibilities".

3. Review Meeting and Completing the Process (continued)

The employee will be asked to confirm that they wish to acknowledge the review. By selecting the OK button, the employee is confirming that he or she has seen their completed review and met with their manager to discuss it.

Performance Document - Six Month Performance Review

Acknowledge Document Review

You have chosen to acknowledge your performance evaluation. To confirm this acknowledgement, click the OK button.

By clicking the OK button, I acknowledge that the contents of this review were discussed. It does not indicate agreement or disagreement.



3. Review Meeting and Completing the Process (continued)

After the employee acknowledges their review, the status of the activity Review Manager Evaluation in Document Details will update to Acknowledged. The review still can be viewed by the employee, but the employee will no longer be able to enter comments.

The employee's manager will receive notification that the employee has acknowledged their review and also can see the change in status of the review in Document Details. After the manager finalizes the review document, the employee will be able to view the completed review from the Employee Performance Evaluations Home page.

The screenshot shows the MY HUB interface with a navigation bar containing 'Welcome', 'Human Resources', 'Kronos', 'Financial Reporting', 'Supply Chain', and 'IMS'. Below the navigation bar is the 'Performance Document History' section, followed by 'Document Details'. The document details for an 'Annual Performance Review: 12/12/2011 - 12/11/2012' are shown. The 'Status' is 'Acknowledged', which is circled in red. A callout box points to this status with the text: 'Review status is "Acknowledged" after the employee has gone into their review and acknowledged that they have met with their manager to discuss the review.'

Annual Performance Review: 12/12/2011 - 12/11/2012 [Help](#)

Performance Document Details

Employee:	[Redacted]	Job Title:	[Redacted]
Document Type:	Annual Performance Review	Period:	12/12/2011 - 12/11/2012
Template:	Employee Review Template	Document ID:	117416
Manager:	[Redacted]	Status:	Acknowledged

Document Progress

Activity	Status	Due Date	Action	Next Action
Establish Evaluation Criteria	✓ Completed	12/11/2012	View	
Complete Self Evaluation	✓ Completed	12/11/2012	View	
Review Manager Evaluation	🕒 Acknowledged	12/11/2012	View	

[Return to Select Documents](#)

4. Viewing Historical Performance Evaluations

Performance reviews completed in ePerformance will be stored electronically, and historical reviews will be accessible to managers and employees.

Employees can view their historical reviews completed in ePerformance (reviews due on or after June 6, 2010) from the Employee Performance Evaluations Home page in My HUB by selecting Past Performance Reviews.

Employee Performance Evaluations Home

Performance Evaluations

[Employee Overview](#)

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View status, complete self-evaluations, and verify the final review document when requested.

[Past Performance Reviews](#)

View your past performance review documents for reviews due after June 6, 2010.

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