ePerformance: Success Tips

Select the correct template: Select the Manager Template if the employee has direct reports in the human resources system, otherwise select the Employee Template. If the wrong template is selected and the performance document is created, it will need to be cancelled and a new, correct template created for the employee to be evaluated on the correct values.

Complete and confirm the evaluation criteria: You can submit peer nominations after you have completed the Establish Evaluation Criteria activity. This requires the manager to create the document and establish the evaluation criteria. Once this step is completed, a Submit button will appear on the peer nomination page.

Transfer Performance Evaluation: The Transfer Document functionality gives the manager the option to assign the completion of an employee's review to someone else. When using this feature, the manager temporarily transfers ownership of an employee's review document to a designee. The designee completes the review and transfers it back to the manager to finalize and submit for approval.

Use weightings correctly: Assigning weightings to the goals and responsibilities is optional. However, if weightings are assigned, the total must equal 100 percent within each section. If the calculation for the overall rating appears to be incorrect on the review, verify that the weightings within each section equal 100 percent and click the Calculate Ratings icon (the little calculator icon) to the right of the overall rating for the section. The Values section of the review cannot be weighted.

Save your work: Be sure to *save often* when completing the evaluation. You will time out after 20 minutes if you have not saved your work.

Complete all steps after the review is approved: Once the evaluation and merit have been approved, follow the instructions carefully to ensure that you have completed each step:

DO NOT USE THE OVERRIDE BUTTON to acknowledge the evaluation for the employee: This is only used if an employee refuses to acknowledge (electronically sign) their review. *Call your local Human Resources for additional advice if this occurs.*

Making changes: The content of the review document can be edited by the manager until the very last step when the manager marks the review as complete. To edit the document, the manager clicks the Reopen button. If the overall rating is updated as a result of the changes, the manager will need to resubmit the review for approval.