

## ePerformance

### Step-by-Step Help Guide for Peer Reviewers

1. [Overview](#)
2. [Alerts and Notification](#)
3. [Completing the Review](#)

**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.

A peer reviewer is a person the manager or designee nominates to evaluate an employee's performance. There are three types of peer reviewers. A Peer (Values/Duties/Goals) can evaluate the employee on the system-wide values, job responsibilities, and goals. A Peer (Values/Duties) can evaluate the employee on system-wide competencies and job responsibilities, but not goals. A Peer (Values Only) can evaluate the employee on competencies only, and not job responsibilities or goals. The peer reviewer is responsible for completing the appropriate sections of the evaluation and submitting it to the manager or designee.

### Preparation Tips:

- Discuss with the manager when the peer review should be returned.
- Review ePerformance resources available to support the peer reviewer role in ePerformance: [Overview](#) | [Frequently Asked Questions](#)
- Review your own notes, previous peer evaluations, or other information regarding the employee's performance.

### ePerformance Resources for Peer Reviewers

Additional [resources](#) are available to assist in understanding and completing the ePerformance process. ePerformance [Roles and Definitions](#) lists the various roles an employee may have in the process. The ePerformance [Checklist](#) provides a timeline for completing the review on time. The [Peer Reviewer Overview](#) and [FAQ for Peer Reviewers](#) provide additional information about completing the process.

### Other Resources

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

Managers: [Overview](#) | [Step-by-Step Instructions](#) | [Frequently Asked Questions](#) | [Desk Reference](#)

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 all employees from the My Profile section of the Human Resources page in My HUB.

The screenshot shows the My HUB interface. At the top, there's a navigation bar with tabs: Welcome, Human Resources, Kronos, Financial Reporting, Supply Chain, Home, Quick Links, Feedback, and Sign out. Below this, the 'My Profile' section is highlighted with a red circle and a red arrow. The 'My Profile' section includes links for: View/update personal information, View job information, View performance review information, Disaster preparedness profile, and COI. Other sections include 'My Payroll' (View/update payroll information, View payslip, Bank accounts), 'My Benefits' (View benefits information, Benefits enrollment, My benefits summary, Online benefit confirmation, MyHealth OnLine (Medical/Dental/FSA), My retirement, My voluntary benefits), 'Pay Advice' (View payslip), 'Leave Summary' (Report a Leave), 'Alerts and Confirmations' (Benefit election, Performance review alert, Review(s) 45 days or more past due), 'My Total Compensation' (Total compensation statement), 'View UPMC Jobs' (View/update recruitment information, View job postings and apply), 'uLearn' (uLearn information), and 'My Staff' (View/update employee information, Performance management, Worklist, Terminate an employee, View applicants for recruitment, View HR Managerial Reports). A banner at the bottom reads: 'Required annual funding notices for UPMC's pension plans now available'.

## 1. Overview (continued)

The Employee Performance Evaluations Home page contains resources and information available to all employees about ePerformance. The right side of the Performance Evaluations section contains resources an employee will use to learn about the peer review process, respond to peer review nominations, and view and complete peer review evaluations.

**Peer Overview:** Learn about the peer review process by reviewing resources that include videos, a help guide, and FAQs.

**Peer Review Requests:** Peer reviewers are nominated by the manager completing the employee evaluation to provide feedback. Peer reviewers respond to the nomination by accepting or denying the request. The manager will be notified of the response.

**Peer Reviews to Complete:** Peer reviewers who have accepted a nomination to complete a peer review can view and complete the document online. The peer reviewer must first accept the request before completing the review.

**Peer Reviews You Have Completed:** Peer reviewers will be able to view, but not edit, reviews they have accepted and completed in ePerformance.

**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.

[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](#)

Peer reviews and resources for employees are in the Employee Performance Evaluations Home page in My HUB.

## 2. Alerts and Notification

Peer reviews are optional. An employee nominated to complete a peer review can accept or decline the request. The contents of a peer review are not directly viewable by the employee under review. Only the employee's manager will see the peer evaluation after it is completed. An employee who is nominated to complete a peer review will receive a My HUB alert that a peer review is available to complete.

To respond to a request to participate in a peer evaluation, the peer reviewer clicks on the Peer Review Requests link on the Employee Performance Evaluations Home page in My HUB.

**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 8, 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](#)

**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.

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

Click the Peer Review Requests link to respond to a request to complete a peer review.

## 2. Alerts and Notification (continued)

Pending Evaluation Requests are the evaluations that the peer reviewer has been nominated to complete. Information is listed, including the name of the employee to be reviewed, the type of document on which the employee will be reviewed, and the due date of the review.

To accept a nomination to complete an evaluation, the peer reviewer checks the box to the left of the employee in the list, and then clicks the Accept button. The peer reviewer can decline the nomination by clicking the Decline button. The manager who submitted the nomination will be notified of the peer reviewer's response.

Completing a peer review is optional. Responding to the nomination will let the manager know whether the peer reviewer will participate, which is helpful to the manager in planning the overall evaluation process for the employee. See the [recommended time line](#) for completing the review on time. It is a good idea for peer reviewers to check with the manager to find out when the evaluation should be completed.

The screenshot shows the 'MY HUB' logo and the tagline 'The source for UPMC human resources & financial data.' Below this is a navigation bar with tabs for 'Welcome', 'Human Resources', 'Kronos', 'Financial Reporting', and 'Support'. The main heading is 'Pending Evaluation Requests' with a 'Help' link. A table lists pending requests with columns for 'Name', 'Document Type', and 'Due Date'. A callout box points to a checkbox in the 'Name' column, stating 'Click the box to the left of the employee's name to respond.' Another callout box points to the 'Due Date' column, stating 'The Due Date listed is the date the manager is required to complete the review. Check with the manager to confirm when to return the evaluation.' Below the table are links for 'Select All' and 'Deselect All', and buttons for 'Accept' and 'Decline'. A red arrow points to the 'Accept' button.

Name	Document Type	Due Date
<input type="checkbox"/> [Employee Name]	Six Month Performance Review	03/09/2013

Select All Deselect All

Accept Decline

Click either Accept or Decline to respond to the manager's nomination request.

Be sure to respond so the manager can plan accordingly.

Check with the manager to confirm the date to return the review.

## 2. Alerts and Notification (continued)

After accepting or declining the nomination, the peer reviewer's choice is confirmed. My Current Evaluations for Others lists reviews the peer reviewer has been nominated to complete and the evaluations the reviewer has completed in the past.

The screenshot shows 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 main heading is 'My Current Evaluations for Others'. A green checkmark icon is followed by the text: 'You have successfully accepted the selected evaluations. Click on the employee's Document Type to open the evaluation and continue.' Below this message are two links: 'Click Here for additional help.' and 'Click Here for an overview of the peer evaluation process.' A table titled 'Current Evaluations for Others' is displayed below the links. The table has five columns: 'Employee', 'Document Type', 'Begin Date', 'End Date', and 'Status'. One row is visible with the following data: Employee (redacted), Document Type: 'Six Month Performance Review', Begin Date: '10/25/2011', End Date: '03/09/2013', and Status: 'In Progress'. Below the table is a link: 'View My Historical Evaluations for Others'. Two callout boxes with arrows point to specific elements: one points to the confirmation message, and the other points to the 'In Progress' status in the table.

**My Current Evaluations for Others**

You have successfully accepted the selected evaluations. Click on the employee's Document Type to open the evaluation and continue.

[Click Here](#) for additional help.  
[Click Here](#) for an overview of the peer evaluation process.

Current Evaluations for Others				
Employee	Document Type	Begin Date	End Date	Status
[REDACTED]	<a href="#">Six Month Performance Review</a>	10/25/2011	03/09/2013	In Progress

[View My Historical Evaluations for Others](#)

Message confirms that the peer reviewer has accepted the nomination to complete an evaluation.

Status of the Peer Evaluation is In Progress after the reviewer accepts.

### 3. Completing the Review

To view and complete a peer evaluation, the peer reviewer clicks on the Document Type to the right of the name of the employee being evaluated. The peer reviewer also can view evaluations completed in the past.

The screenshot shows the MY HUB interface. At the top, there is a navigation bar with links for Welcome, Human Resources, Kronos, Financial Reporting, Supply Chain, and IMS. Below the navigation bar is a section titled "My Current Evaluations for Others". The text below the title reads: "Listed below are your current evaluations for which you are providing feedback. Click on the employee's Document Type to open the evaluation and continue." There are three links: "Click Here" to view new evaluation requests, "Click Here" for additional help, and "Click Here" for an overview of the peer evaluation process. A table titled "Current Evaluations for Others" is displayed. The table has five columns: Employee, Document Type, Begin Date, End Date, and Status. There are two rows of data. The first row shows a redacted employee name, "Performance Evaluation", "12/01/2012", "03/31/2013", and "In Progress". The second row shows a redacted employee name, "Six Month Performance Review", "10/15/2012", "12/15/2012", and "Completed". Below the table is a link "View My Historical Evaluations for Others". Three callout boxes with arrows point to specific elements: one points to the "Performance Evaluation" link in the first row, another points to the "Six Month Performance Review" link in the second row, and a third points to the "View My Historical Evaluations for Others" link.

View or complete an evaluation that you have been nominated to complete.

Employee	Document Type	Begin Date	End Date	Status
[Redacted]	<a href="#">Performance Evaluation</a>	12/01/2012	03/31/2013	In Progress
[Redacted]	<a href="#">Six Month Performance Review</a>	10/15/2012	12/15/2012	Completed

View evaluations you have previously completed.

[View My Historical Evaluations for Others](#)

**Note:** You can return to this page by clicking on View Performance Review Information under the My Profile section and then clicking Peer Reviews to Complete.



### 3. Completing the Review (continued)

The peer reviewer evaluates the employee on the performance criteria established by the employee's manager. The evaluation document a Peer (Values/Duties/Goals) completes includes the system-wide values, job responsibilities, and goals. The evaluation document a Peer (Values/Duties) completes does not include the employee's goals for the performance period. The evaluation document a Peer (Values Only) completes includes only the system-wide values. Completing a peer review is optional.

The top section of the evaluation document includes information about the performance review period, the employee being evaluated, the name of the reviewer (author), the role the reviewer has in the process, the due date of the review, and UPMC's Mission and Vision.

The Due Date listed is the date the manager is required to complete the review. Check with the manager to confirm when to return the peer evaluation.

Review Notes for Tips, Updates, Reminders and Help links.

**Tips:**  
Save frequently while working on the evaluation.  
Expand/Collapse sections to control your view of the document.

View the evaluation in PDF format (printer icon). The document can be printed or saved, but not changed.

Select Save while in the process of completing the review. Select Complete when done. After selecting Complete, the peer reviewer can no longer edit the document.

### 3. Completing the Review (continued)

The review criteria in the evaluation document are established by the employee's manager. Completing a peer review is optional and the peer reviewer can choose the criteria to evaluate. To evaluate the employee, the peer reviewer will review the performance criterion in the document and select a rating for each item. The peer reviewer can also provide comments.

The review criterion, include the UPMC values, employee's goals, job responsibilities, and an overall summary, comprise the sections of the evaluation document.



Expand and Collapse sections to control your view of the document.

### 3. Completing the Review (continued)

If the peer reviewer will evaluate values, the values section of the document lists the common UPMC values. The peer reviewer can evaluate the employee and provide comments at the end of this section.

Hover over View Details to see a description of each UPMC Value.  
Click on View Details to see the behaviors associated with each rating score.

#### Section 1 - Values

[Expand](#)

[Collapse](#)

##### Care and Listening

[View Details](#)

Rating:

##### Dignity and Respect

##### Innovation and Excellence

##### Quality and Safety

##### Responsibility and Integrity

##### Care and Listening

Top Performer (Exceeds expectations 90% or more of the time.)	Superior Performer (Exceeds expectations more than 50% but less than 90% of the time.)	Satisfying/Good (Meets expectations a majority of the time.)	Marginal Performer (Does not meet expectations up to 50% of the time.)	Deficient/Poor Performer (Does not meet expectations more than 50% of the time.)
Fulfills the needs of intermulticultural customers and exceeding expectations in a high priority. <ul style="list-style-type: none"><li>• Listens carefully, asks questions, checks his/her understanding, and maintains eye contact to understand customer's needs.</li><li>• Genuinely cares for customers, addresses their needs in the manner in which the customer prefers.</li><li>• Proactively offers input, feedback, and perspective for improving the customer experience.</li><li>• Incorporates customer feedback to modify and improve his/her service approach.</li></ul>		Considers the needs of the intermulticultural customer when providing service. <ul style="list-style-type: none"><li>• Listens, shows care and empathy while providing service.</li><li>• Identifies problems in service, resolves single and/or routine issues that impact the overall customer experience.</li><li>• Pursues service recovery when needed.</li><li>• Asks for customer feedback on service provided.</li></ul>		Does not place high priority on the needs of intermulticultural customers. <ul style="list-style-type: none"><li>• Does not demonstrate interest in meeting customer's needs, lacks empathy.</li><li>• Does not readily identify service problems or work toward resolving them expeditiously.</li><li>• Does not seek feedback to improve service.</li></ul>

##### Values Summary

Comments:

Comments can be provided at the end of each section. Comments are optional.

### 3. Completing the Review (continued)

If the peer reviewer will evaluate goals, the goals section of the document will list the employee's individual and, if applicable, department specific goals for the review period. The peer reviewer can evaluate the employee on the goals and provide comments at the end of this section.

[Expand All](#)   [Collapse All](#)   [Expand Sections](#)

▶ **Section 1 - Values**

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▼ **Section 2 - Goals**

[Expand](#)   [Collapse](#)


▼ **FY2016 3.2090 Goal 1**

**Description:**  
Departmental Goal (07/01/2015-06/30/2016): Do something great - SMART format!

Cascades from business unit goal: Continue to lead, develop, and implement new models of care.



Cascades from enterprise goal: Lead healthcare innovation via the Integrated Payor/Provider Model, developing New Models of Care, leveraging Smart Technology, and developing/utilizing Good Science

- Due Date : 06/30/2016

Rating:  

Weight: 0 %

**Goals Summary**

Rating:  

Comments:

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 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.

### 3. Completing the Review (continued)

If the peer reviewer will evaluate job responsibilities, the responsibilities section of the document will list the employee's job duties. The peer reviewer can evaluate the employee on job responsibilities and provide comments at the end of this section.

The screenshot displays the 'Section 3 - Responsibilities' interface. It features three responsibility sections, each with a description, a rating dropdown menu, and a weight percentage. The first section, 'Responsibility 1', has a description about performing duties in accordance with UPMC Health Plan standards. The second, 'Responsibility 2', describes interacting with members and families. The third, 'Responsibility 3', describes developing a relationship with institution administration. At the bottom is a 'Responsibilities Summary' section with a 'Comments:' field. Callouts with arrows point to specific elements: one points to a rating dropdown, another to a list icon next to it, and a third to a spell check icon (a book) in the bottom right corner of the summary section.

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 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.

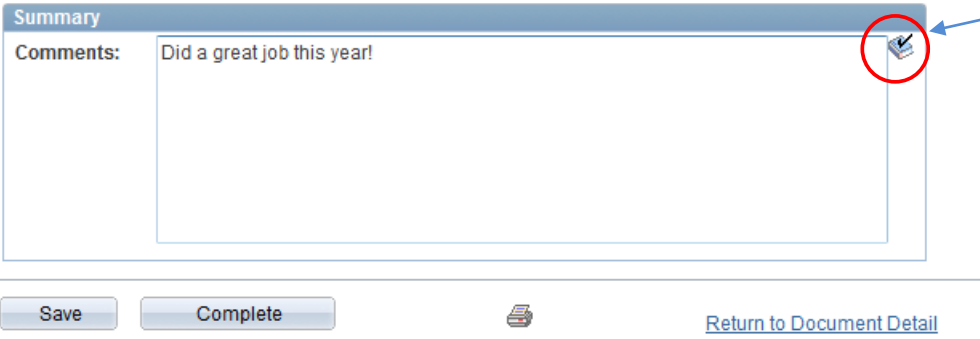
### 3. Completing the Review (continued)

The peer reviewer can provide an overall summary of the employee's performance in Section 5 of the review. Comments are optional.


Section 5 - Overall Summary

Summary

Comments: Did a great job this year!

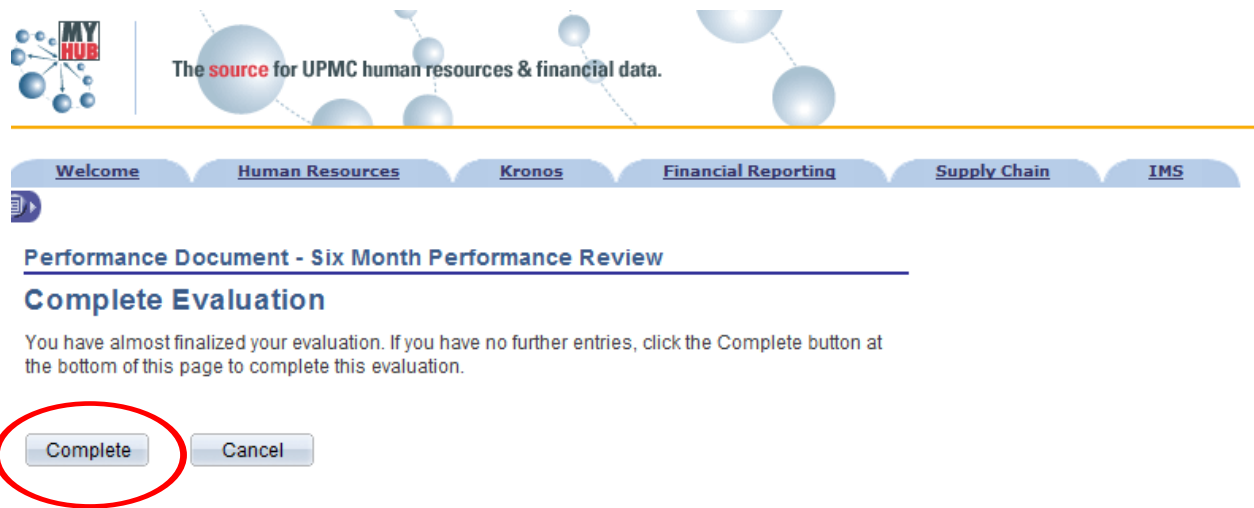


Comments can be entered in the Overall Summary. Click the spell check (book) icon to use this tool for spelling suggestions.

Save Complete  [Return to Document Detail](#)

### 3. Completing the Review (continued)

When the peer reviewer has finished evaluating the employee and the document is complete, the reviewer selects the Complete button and confirms. Once this step is completed, the document can no longer be edited by the peer reviewer unless it is reopened by the manager.



### 3. Completing the Review (continued)

After the evaluation is finalized by the peer reviewer, the manager receives an automatic notification that the peer review is complete. The status of the evaluation in the peer reviewer's historical evaluations list changes to "Completed." It is a good idea for the peer reviewer also to inform the manager that the evaluation has been completed.

The screenshot shows the MY HUB interface. At the top, there is a logo for MY HUB and the text "The source for UPMC human resources & financial data." Below this is a navigation bar with tabs for Welcome, Human Resources, Kronos, Financial Reporting, Supply Chain, and IMS. The main content area is titled "My Historical Evaluations for Others" and includes a green checkmark icon and the text "You have successfully completed your evaluation." Below this is a table with the following data:

Employee	Document Type	Begin Date	End Date	Status
[Redacted]	<a href="#">Annual Performance Review</a>	04/06/2009	06/18/2010	Cancelled
[Redacted]	<a href="#">Six Month Performance Review</a>	07/19/2010	01/19/2011	Completed
[Redacted]	<a href="#">Annual Performance Review</a>	02/29/2012	08/28/2012	Completed
[Redacted]	<a href="#">Six Month Performance Review</a>	10/25/2011	03/09/2013	Completed

Below the table is a link: [View My Current Evaluations for Others](#)

Status is "Completed" after the peer reviewer has finalized the evaluation.