

**PERFORMANCE MANAGEMENT CONFERENCE CALL
QUESTIONS AND ANSWERS
DECEMBER 12, 2013
DOHR/ F&A - Edison**

1. What is the contact information for Edison and DOHR help desk?

Edison Help Desk: 615-741-HELP (4357)

DOHR Employee Relations: 615-741-1646

2. The quick reference guide identifies the appointing authority approval process is as follows: HCM-Workforce Development-Performance Documents-Approve), but the appointing authority is not authorized to view the appointing authority link according to Edison.

Edison – This sounds like the user does not have the proper roles. Roles give access to navigations.

3. Is there a report that will help us confirm that all the raters and reviewers have proper roles?

Edison – Listed are several queries that will answer the question and a several others that readers may find useful or may not be aware exist:

- For a list of employees who are Rater's but do not have the Supervisor role run query TN_HR75_PM_RATER_WOUT_ROLE.
- For a list of employees who are Reviewer's but do not have the Reviewer role run query TN_HR75_PM_REVIEWER_WOUT_ROLE.
- For a list of employees with a supervisor or reviewer role run query TN_HR75_ROLE_HR_SUPRV_OR_REVWR.
- For a list of roles by EmplID run query TN_HR78_HCM_SEC_ROLE_BY_EMPLID

4. Are new supervisors required to take both the online PM training and face-to-face S.M.A.R.T. training before they may complete IPPs?

DOHR – Yes

5. It was stated that raters and "above" are required to complete the online PM training. Can you clarify the "above" part? Does this include managers who currently do not supervise?

DOHR – Raters and above are defined as anyone who supervises and are responsible for completing or approving/denying a performance review of an employee to include the appointing authority or the person designated to act on behalf of the appointing authority in the PM process.

6. Since Dec. 15th, 2013 falls on a Sunday, will the deadline be the Monday after, or the Friday before?

DOHR – Under normal circumstances, an IPP should be completed within thirty days after the start of the PM cycle. The purpose of having the IPP completed within the first 30 days is to give the employee the optimum amount of time to understand what is expected and to work towards meeting the expectations of the rater. However, not meeting a due date is not a procedural violation in and of itself.

Due to issues with the on-line PM training, the on-line training was taken down in order to resolve those issues. As a result, the normal due date was adjusted to December 15, 2013, to allow raters and reviewers additional time to complete the required training prior to completing the IPP process with their employees. Please continue to encourage your raters and reviewers to complete the IPP process as soon as possible.

7. Is there a query that will show all the Performance Documents due in a specific month? I would like to send emails to supervisors as reminders the month before their documents are due?

Edison – Queries TN_HR501 and HR502 have been designed to allow the user to enter “Due Dates From” and “Due Dates To” into prompts. This will allow for a date range to be selected. The ability to enter a date range is essential since due dates will vary as documents (Annual, Probation, Flex) are created.

8. At least 3 people show up 2 times when I pull the IPP Status query? Not sure why that happens?

Edison – If an employee is overlapped, then the employee is returned two times in the query results. Also, it could be that a document was canceled and another document was created. Until the canceled documents are deleted, this employee will appear in the query results. Edison will look into removing documents with a canceled status from the query results.

9. Is there a way Edison can block an IPP from being submitted from the rater to the reviewer when the rater did not enter the “goal” right after the work outcome statement?

Edison – No. This is a training issue. The rater should be trained to add the agency’s strategic/operational goals and the Governor’s priorities in Section 1 and link the appropriate strategic/operational goal or the Governor’s priority to each work outcome in section 2. The reviewer should be trained to deny documents that do not contain a goal in section 1 or have not

been linked to a goal in Section 2. This scenario is demonstrated in the rater and reviewer Webinars located on the Edison portal.

10. Can the system prevent the rater from continuing on to the next phase/step?

Edison – No, the system cannot prevent someone from moving into the next phase/step.

11. If the supervisor hit submit again and went into the Interim 1, we can push reset and it will go back until the end of the IPP?

Edison – Correct. If the document has not been acknowledged, the document will return to the beginning of the section.

12. A supervisor has completed the first portion of the Interim Review 1 by accident. How can I correct this?

Edison – If a rater has submitted a document to the reviewer in the Interim 1 step by accident, the document can be denied by the reviewer and the rater can reopen it which will take it back to the Submit step for Interim 1. If the Interim 1 step has reached the acknowledged stage, the Annual document would need to be canceled and a new Annual document created. The rater will then approve the IPP through the “Acknowledged” step.

13. We have a rater that kept pushing submit until it finally said complete and finished the Annual Review. What do I do to correct this?

DOHR – The Annual document would be canceled and a new Annual document created for the rater to approve the IPP through the “Acknowledged” step.

14. The only time you should see a “complete” is at the end of the cycle when the Annual Review is completed, correct?

Edison – That is correct.

15. How do we proceed if an IPP has workflowed completely through the IPP process and is acknowledged but the work outcomes are not linked to a strategic/operational goal or Governor’s priority?

DOHR – The Annual document would need to be canceled and recreated to select the strategic/operational goal or Governor’s priority that aligns with the each work outcome and the document would workflow back through the approval process to the “Acknowledged” stage.

16. Some raters are attaching the word document of the work outcomes or actions steps that did not fit into the text box with the 1325 character limitation. Is this acceptable?

DOHR – The attachment feature should be used on rare occasions. Please see Question 18.

Although there are character limitations for both the work outcome section and the action steps, using the tips below should reduce the need to use the attachment feature. Each of the sections will allow a maximum of 1,325 characters; this includes every space, punctuation, etc. The 1,325 characters should accommodate most individuals entering information in these fields. However, if you receive an error message regarding limited space, try the following tips:

- Remove headings such as “outcome 1” or “behavioral action steps”, these headings are already on the document and don’t need to be repeated.
- Instead of using the word “and” use the sign “&”.
- Instead of using the word “with” use “w”.
- Abbreviate where appropriate such as your agency name, the state, etc.
- Do not double space after periods or skip lines, this takes up character spaces.
- Remove numbering of action steps and/or bullets.
- Only use action steps that support the work outcome. While not all outcomes require action steps, no more than three action steps are recommended to provide focus.
- To check the total number of characters in a document, you can do so in “WORD” if necessary, by looking in the bottom left corner of the Word Document and click on the little box that says *Words*, a pop-up will give you word and character count in the document or you can high-light the section of the document that you need calculated.

17. Up to what point (timeframe) in the PM process can work outcomes be added as attachments?

DOHR – No less than 90 days prior to the end of the PM cycle to allow the employee an appropriate amount of time to perform to the expectations and to allow the rater an appropriate amount of time to observe the employee’s performance.

If a new assignment during the review cycle results in a work outcome that occupies a considerable portion of the employee’s time, or which is of critical importance, the rater may need to add it to the individual performance plan. In order to rate a work outcome that was added to the IPP during the review cycle, there must be adequate time between assignment of the new work outcome and the date of the annual review (at least 30 days between each procedural step or a minimum of 90 days). To be rated, the employee must receive two interim review discussions about their performance. Additionally, this may only be done with prior approval from the reviewer and the total work outcomes for the employee should remain 4 to 6. See page 26 of the Performance Achievement Training Handbook (P.A.T.H) for further details at <http://www.tn.gov/dohr/ogc-er/performance/pdf/PATH.pdf>.

18. Where is the paper form on the DOHR website?

DOHR – Using the paper forms should be rare and only in unusual circumstances. If there is a need for using the paper form, an Annual-Paper must be created in Edison at the beginning of the review cycle for tracking purposes. Please e-mail Employee Relations at billieann.moore@tn.gov for specific instructions on the new tracking method for Annual-Paper documents. The new Annual Review forms can be found at <http://www.tn.gov/dohr/ogc-er/performance/perform.shtml>.

19. Is the Department ID column now pulling into the status query report?

Edison – Yes. The DeptID has been added to the TN_HR501, 502 and 503 queries. If a user created a Run Control ID prior to the change to add DeptID as a prompt to the query, then the user will need to select “Update Parameters” on the Run Control ID to select prompt values the next time the query is scheduled.

**20. Is there a way that the header for each document could be highlighted or bolded?
This would make it easier to identify as a different document.**

Edison – We would need to understand more about which header needs to be highlighted, but there are no current plans to do so.

**21. The queries look great and we are requesting that you continue to add the
County/Location to all queries.**

Edison – We will evaluate this request.

**22. It would be great at other steps in the process if the webinars could begin earlier in
the process.**

Edison – We will take that under advisement.