

Reviewer Webinar – Transcript

Hello and welcome to the Edison Webinar for Performance Management Enhancements.

This particular Webinar will focus on the role of the Reviewer. Additional webinars are available that will focus on the roles of the employee, rater (supervisor), and the Appointing Authority. You will notice that these webinars are posted on the Edison portal, and you can find those there for your easy reference.

We have also included a Quick Reference Desk Guide, that I will bring up and show on your screen at this time.

:40

This desk Quick Reference Guide is an easy to read 8 page document that will take you through some of the high hitting points of the Performance Management process. DOHR does have additional training to support the Performance Management process as well. Your performance management coordinator within your agency is also a valuable resource if you have any questions.

1:05

You'll notice that there are two major enhancements related to this Performance Management Cycle. These are that 1) All stages of the performance management process will now be managed through one form, and 2) Only ratings of Unacceptable or Outstanding will need approval by the Agency Appointing Authority.

Previously in the system the Appointing Authority would be required to approve all documents moving through the system.

Previously in the system, we would have individual documents for each phase of the Performance Management Process. In other words, we would have one document for the Individual performance Plan, one document for the Interim 1, another for the interim 2, and yet another for the Annual. These are now all managed through one sequential form.

We hope that you find this helpful and an easier way to manage your documents.

2:06

We have also included some helpful navigations as a part of this Quick Reference Guide on the very first page.

The section for the Performance Reviewer is indicated in Green.

Where do I go? To approve: Manager Self Service > Performance Management > Approve Documents

2:30

We are going to be going through several approvals in the system today to show what this will look like in Edison. You will also notice that throughout the quick reference guide we have also included screenshots, helpful hints, instructions, and information on each of the phases of the process that you will be completing.

2:57

An additional feature that we will focus on as we move through the document, is that there is now an audit at the bottom of the document. This includes due dates for each phase. Under each phase, you will notice that you will have the same steps throughout.

Your job as the reviewer is to approve/ deny these documents as they move through the phases.

If you have any questions regarding approval, please reference DOHR's training materials related to performance management, or see your agency's performance management coordinator.

On Page 8 of the Quick Reference Guide, we also included a helpful diagram of the Performance Management Process. This document, shown in landscape, is designed to show the functions of each of the 4 participating roles, and individual actions throughout.

4:32

You'll notice that your role as the reviewer has a very simple workflow. For those of you that have participated in the Performance Management process in the past, you may not notice much of a difference.

At each procedural step, you will either approve/ deny the document based on the comments and your basic review of the document.

I will go ahead and bring up the live system now, so you can see what these actions look like.

5:10

When you first log into the main page, you will click the Main Menu Link

Please Click Manager Self Service

Next, Performance Management

And then Approve documents

You will see on the page, the transactions that are pending your approval.

You can sort your documents by any of the fields at the top of the page.

Because we already have Mr. Green's document up, we will work with that document by clicking the Blue hyperlink for the employee's name.

The approval status is submitted, which means it is awaiting your approval.

You would have known that this approval was awaiting your approval because you would have received an email notification letting you know that this was ready.

Please click Alex Green.

7:10

This brings us to the Approval Page.

At the bottom of the page, you will see the option for Approve and Deny.

You are not yet ready to approve / deny this document because we have not yet reviewed the document.

The easiest way to pull up the performance review so that you can make your approval decision, is by clicking the link for Performance Document Detail

7:31

You'll notice that this is the first time that we have seen the Performance Review Document. This is what we are reviewing before we approve.

You will see expand buttons throughout the document that will individually expand each section so that you can review. A helpful hint is to click the expand all link, which will give you access to see all of the sections in full of the performance review.

8:00

You will then be able to review all of the work outcome statements/ action steps and make the appropriate approval decision.

You will also notice that the Interim 1 and Interim 2 sections have not been populated.

8:20

For this particular example, we only used one work outcome statement. The system will allow for up to 6 work outcome statements. Any work outcome statement sections that are not used should be left blank by the rater.

8:39

You'll notice that there is also an attachment feature on the document, if anyone added any special attachments to the review.

And, as we mentioned earlier, we have an audit history at the bottom of the page.

You will notice that this also displays the due dates for each section.

If we go to the bottom, we have reviewed the document; we are ready to go to return to performance document approval.

9:15

At this time, we will decide if we would like to approve/ deny this document.

You will enter any appropriate and associated comments to the review in the comment section at the bottom of the page. Once these comments have been entered, you have the option of using either the Approve/ Deny Buttons at the bottom of the page.

Please Click Approve

9:50

This Document was approved. Click OK.

This review has been moved on to the next step that needs to be completed.

10:00

We have hopped into our 'time machine' to move on through the IPP to the Interim 1 phase. This follows the approval of the IPP, which we just completed.

The Rater will then make this available for review, the employee and the rater will have their meeting, it will then be marked as review held, and then the employee will acknowledge that document, or the rater will acknowledge on behalf of the employee if they are unwilling/ able to acknowledge.

For this example, the employee acknowledged the document themselves.

We have now moved ahead in time once again, and we are ready for the Interim 1 documents.

10:51

When the rater submits this document, you will receive an email notification that this is ready for your review.

You will use the navigation: Manager Self Service > Performance Management > Approve Documents

11:15

On this page, you will see that there is 1 document for Alex Green (Document status in progress), and the approval status was submitted, by the Rater Billy Dalton.

Let's Click Alex Green

11:30

You will see that we have the performance document details link, and approve/ deny at the bottom.

We should not take any action until we have reviewed the Performance Review.

That will be completed by clicking the Performance Document Detail link, please click that link now.

11:53

A helpful hint is to click Expand All to open up all sections of the Performance Review.

You will notice that under section 2, the interim 1 comments have been populated.

If you go to the bottom of the page, you will see that the audit history has also been populated. This will show all of the steps that have occurred up until this point. The last step to occur was Submit for Approval on the Interim 1 Phase by Billy Dalton. This will show a date/ time stamp as well.

You would have received that email notification that we mentioned when this was submitted.

12:41

When we are done reviewing, we will click Return to Performance Document Approval

This is where we can approve or deny, and make any applicable comments.

Please enter comments on this review as appropriate by your agency, and DOHR policy.

13:00

Please click approve at this time for this document.

The save was successful, so we'll go ahead and click OK.

This document is now ready to move through the next stages of the Performance Review cycle for the Interim 1 phase.

It can now be marked available for review, the rater will have the face-to-face meeting with the employee, Review will be marked held, the review will be acknowledged, and then we will be ready to move on to the Interim 2 phase.

Let's go ahead and move on to the Interim 2 phase at this time.

13:35

Now we're ready to approve/ deny the Interim 2 document.

We knew that this was ready for our approval because we received an email notification when this was submitted by the Rater.

We will be able to see that on the Audit history of the Performance Review

14:00

Please click Alex Green

You will notice that we can see Approve / Deny, but we are not ready for approval.\

Please click Performance Document Details.

Click Expand All

The interim 2 comments have been entered.

You will see that on the audit history has been submitted by the Rater, Billy Dalton.

This is now awaiting approval by the Performance Reviewer, which is you. We will complete that approval at this time.

If we were to deny this document, it would be sent back to the rater and that line of the audit history would be cleared. When the rater submitted the revised document for approval, the audit history would be updated.

For this example, let's go ahead and just approve this phase of the document.

Click Approve at this time.

We see that this was successful, so we will go ahead and click OK.

15:30

We have now completed our involvement on the Interim 2 phase, our next action will follow the submission of the Annual Phase of the document awaiting our approval. We will know that this submission has been completed when we receive an email notification.

16:15

We have now fast forwarded in time to the last phase of the performance review, which will be the annual.

After receiving an email notification, we have navigated to the Approve Documents page in Edison.

Find your performance review, and click the Name.

Click Alex Green.

We are not ready to approve until we have seen the document, and made our approval evaluation.

Click Performance Document Details now.

Click Expand All

17:00

The document ID on the top right of the page is a good reference number if speaking with the Edison helpdesk, performance management coordinator, or anyone else that you would like to know which particular document you are working on.

As you move down the page, you will see that both Section 1 and Section 2 are fully populated. Interim 1 and Interim 2 comments that we previously approved are also still in the system.

17:34

As you move down the page, you will that under Section 3, the Overall performance Rating has been populated as Valued Performance. You can also see the Justification for the overall rating in Section 4.

17:45

Because we wanted to show you what denying a document would look like, you may have noticed that there was something intentionally left out of this performance review that would need to be corrected by the rater. Under work outcome statement 1, as part of the annual phase, a new field appeared called End of Cycle outcome rating, as well as a justification. This was not populated by the rater and would need to be fixed.

You would then deny the document, it would be sent back to the rater, and when they re-submitted, you would receive another email notification. The audit history will be updated.

On the performance review, please be sure to check all fields. Section 3 and Section 4 will be particularly important. Values in section 3 of Unacceptable or Outstanding will require direct approval by someone with the agency Appointing Authority Role.

The Justification provided in section 4 will be very helpful in explaining why a particular overall rating was chosen, especially in scenarios of an Unacceptable or Outstanding rating requiring that additional approval.

18:53

You do not yet see employee end of cycle comments, because we have yet to reach that stage of the cycle. Employees will be able to complete such comments after the review has been held, and they are ready to acknowledge.

19:03

We are ready to DENY this document, so please navigate to the bottom of your page and select Return to Performance Document Approval.

We will have the rater update the performance document, and then we will be able to reprocess this approval.

19:15

Please Click Deny, you could provide any comments for the rater on this page.

Please then Click OK

The rater will then receive an email notification that this has been denied and they will need to update. A conversation with the rater may be helpful at this time, to expand on any denials that may not be easily explainable in the comments.

19:57

You will see on the approval chain that this has been denied

20:15

As a clarification, it was work outcome rating 1 in section 2 that was not updated by the rater.

This was updated by the rater, and resubmitted.

We would now be able to see that updated on the document when approving.

Please click Alex Green once more

20:57

Click Performance Document Details

Click Expand All

Go Down to section 2, and you will see that the end of cycle outcome rating and justification have been entered.

This fixes our problem, and we are now ready to approve.

In section 3 and 4, you can see the rating and justification for the Annual Review.

Employee comments have not yet been entered.

If we are ready to approve, return to performance document approval

22:00

Go to the bottom of the page, put in any applicable comments, and then we will approve that document.

This will be marked as available for review, the employee will review that document, the employee & rater will have their face to face meeting, the review will be marked held, and the employee will then be able to acknowledge the review. At that point, the employee will be able to enter their comments.

These comments will be a part of the performance review from that point forward.

At this point, documents with an overall rating of Outstanding or Unacceptable will directly workflow to the appointing authority role within your agency for their approval.

22:45

If you do have any additional questions, please feel free to call the Edison Help desk at 615 741 HELP (4357), or see your performance management reviewer in your agency.

We suggest that you download the quick reference guide, and review the other webinars as appropriate for your job duties.

We appreciate your attention, and hope that you have a wonderful rest of the day.