

Employee Webinar Transcript:

Hello, and welcome to the Edison webinar for performance management enhancements. This particular webinar will focus on the role of the employee.

You'll also notice that posted on the Edison portal are three additional webinars for the other roles that participate in the performance management process. This will include the rater (supervisor), the reviewer, as well as your agency appointing authority. There are webinars, specifically for each one of these roles, just like this one for employee. We've also created an 8 page quick reference guide that you can download and print for your reference.

This is displayed on the webinar screen at :48.

You'll notice that the Quick Reference Guide contains some helpful navigations, as well as some things you may want to know about the performance management process in the system. One thing that we wanted to make sure that we brought to your attention was the navigations that you will use in Edison.

First thing that you will need to do is log-in to Edison. If you have any trouble logging into Edison or any Edison general questions, please contact the Edison Help Desk at 615-741-HELP (4357).

The Navigation for the Employee will be Employee Self-Service > Performance Management > My Performance Documents > Current Documents. A basic overview of the performance process is shown by the diagram you can see at the bottom of your screen.

Documents will be created, then they will go through the Individual Performance Plan, Interim One Phase, Interim two phase, and finally the Annual document. Previously in the system, these were all tracked separately as individual documents. In the system now, we have combined all of these documents into one sequential document that will be able to be tracked as one document through the system.

2:23

Anytime there is an action pending your entry, such as acknowledging a review or making comments, you will receive an email notification in your inbox. If you have trouble receiving Edison email notifications, please check your email address in your My System Profile or check your spam settings in your email provider, most likely outlook.

As you move through the Quick Reference Guide, it will give some helpful hints throughout the process, but much of this may not apply to you if you do not serve as the Rater, Reviewer or Appointing Authority.

3:20

One thing that we wanted to make sure that we brought to your attention was that there is a diagram on page 8 of the Quick Reference Guide. This is printed in landscape, so it may be a little difficult to see on the screen, but is designed to be printed out. It does designate the four aforementioned roles, The Appointing Authority, Reviewer, Rater, and the Employee. You will notice that the diagram does designate each individual step that will be required of each role throughout the process. The process flows through following the arrows on the diagram.

4:00

We are going to log into the system and show you what this looks like in the Edison system, instead of just providing you with navigations and screenshots. We think it is always best to learn by doing, and a great way of doing that is looking over our shoulder during this webinar as we complete this process.

Let's go ahead and log into the system and go through the process at this time:

4:20

We are now logged into the Edison system. For those of you that might not be as familiar with the Edison system, you'll notice that on the top bar there is a main menu. Please click that, and that will give you some additional options to get to the navigation that we are going to go to.

You will then click Employee Self Service > Performance Management > My Performance Documents > Current Documents.

4:53

Where we are currently is that you will notice that the Status is currently in Progress. You will see that this is an Annual document and you will see a Begin and End Date for this particular document.

What has currently happened is that your document has been created. Your rater is filling out the first part of this, which is the Individual Performance Plan. That will then be approved by the reviewer, and then this will be marked available for your review. That has not yet occurred in this example.

5:20

So, if you click on the annual underlined hyperlink, you will see that there are no actions or next actions on this page. You will see that the status of the document is In Progress. There is nothing you can do with this document at this time. Once this is approved by the reviewer and marked available for review by the rater, you will then be able to go in and review this document before your meeting with the rater (supervisor).

Once this is marked available for Review, you will receive an email notification.

6:00

Let's go ahead and return to Select Documents, and we're going to fast forward in time just for a second and have the review marked as 'available for review'. You will receive an email notification, which will prompt you to go to this navigation.

The document is available for your review. You cannot do anything to the review document, but you can review it to prepare for your face-to-face meeting with your rater (supervisor). Once you have that meeting and they mark that review held, you will then be able to acknowledge that document.

Let's go ahead and navigate from the beginning.

6:45

We have logged into Edison, we received our email notification letting us know that this was available for our review. We will click Main Menu > Employee Self Service > Performance Management > My Performance Documents > Current Documents.

Click Annual

The document will display the status in two separate locations on the Current Performance Documents page indicating that the Status is : Available for Review. It will also display a due date for this particular document.

Let's Click View at this time

7:18

Now we can see for the first time, the Performance Document.

7:28

You'll notice where my cursor is right now, it is blank. Further through the process, as the review has been held (your face to face meeting with the rater) Where the cursor is now, will be marked as acknowledge.

For the individual performance plan, please review Section 1 – Strategic & Operational Goals and Work Outcomes and Action Steps. In section two, you will be working with Performance Planning , Observation and Feedback. Your supervisor should contact you to schedule a meeting to discuss these performance expectations, again that is the face-to-face meeting.

A helpful hint on the performance review document is to use the Expand All link on the screen. This will keep you from having to expand each individual section individually with the arrows.

8:08

This will open all of the sections throughout the page. It will open your strategic and operational goals as entered by the Rater. As we go down the page to section 2 – Performance Planning, Observation & Feedback, your work outcome steps and action steps have been populated, as well as the support goals.

You will notice that on the performance review example only one work outcome step has been populated. The system will accommodate up to 6 work outcome statements. So if one has been populated, 5 would be blank, and so on/ so forth.

9:00

As we go down the document, you will see an audit history of what has occurred with the document. You will see that this has been submitted for approval by the Rater (Billy Dalton), approved by the reviewer (Michael Lewis), Marked available for Review (Billy Dalton) – which prompted the email notification which brought you to this page. The document is now pending that the review to be marked held.

You will see going down the page, the further steps of the process, moving from the IPP > Interim 1 > Interim 2 > Annual. As an employee, you will not be able to comment until the Annual Phase of the review. You will only be able to acknowledge that you have had your meeting at each particular step, as well as review your document before your meetings.

Let's return to Document Detail

9:57

In the real world, we would have had our face to face meeting with our rater and then they would mark that the review has been held. You would then be able to acknowledge the document.

10:25

You'll notice that your page has been updated, now showing that you are ready to acknowledge the document. Please click acknowledge at this time.

Click expand all to see everything that you have reviewed, and any comments that have been made.

You will notice that the interim 1 and interim 2 sections under Work Outcome Statement 1 are blank because these steps are yet to occur. If we scroll to the top and the bottom, we can see the button for Acknowledge review.

Both of these buttons will do exactly the same thing.

Please click acknowledge review.

To confirm this, please select OK.

You have now acknowledged this, which will move on to the next phase of the document.

Anytime throughout the year, you will be able to navigate to Employee Self Service > Performance Management > My Performance Documents > Current Documents to review this document. You can click Annual, and you will see that you have an Edit link that will take you to the performance document.

12:09

We have now moved to the Interim 1 phase of the process. You would have received an email notification that this was available for your review.

This is available for your review before your face to face meeting with your rater.

Please click annual to bring up the document.

12:45

You will see that there are no Next Actions on the page, but you can click view to review your document before your meeting. Again, please click Expand All once you have opened the performance review. You'll notice that the Acknowledge Review button is no longer there. This will not be available until the review is marked held.

If we scroll down the page, in section 2, the Interim 1 has now been populated. The additional work outcome statements are blank for this example, allows for up to 6.

At the bottom of the page, you will see again the detailed audit history of this document.

13:35

Let's return to the document Detail

We will fast forward in time

Face to Face meeting has occurred and Review has been marked as held.

We will do that right now offline:

14:02

Your rater has marked that the review has been held. Click Annual, which will take you to the document details. You will notice that the page now has a next action of Acknowledge. This is the same process that we followed through the IPP. As we move through the stages, you may notice that this is a bit repetitive.

Click expand all to open up all the sections of your document. You will see that the interim 1 comments have been populated.

14:40

You can also reference the audit on the bottom of the page. Once you have reviewed the audit history, please click Acknowledge Review

You are not able to put any comments in until the Annual Phase of the Document.

We've clicked acknowledge review, and we will click OK

We have now acknowledged the Interim 1 and we are now ready to move on to the Interim 2 Phase of the Performance Process. Of course in the real world, these steps are going to spread out over months, and you will receive email notifications to prompt you to begin each step.

You should also be in active communication with your rater as this process goes forward.

15:30

We have now moved on to the Interim 2 phase of the document. Again you would have received an email notification for any pending action on your part. There is nothing you can do with the document when it is available for review, other than review the document, but it is helpful to review the document and comments before your face to face meeting with the rater.

16:00

Please Click Annual

You will notice that there is no 'next action', but you can go in and view the document by clicking view.

Please expand all.

Interim 2 comments have been entered (example text)

We will see our audit history at the bottom of the page.

Once you have reviewed, please return to Document Detail.

We will now fast forward once again to past having a meeting with the rater, and this review marked as 'review held'.

You will then see the acknowledge button under the next actions column

16:40

We will fast forward once more in time, to show that this has occurred.

You will see that the status is now marked as 'review held'.

You will receive an email notification letting you know that this review has been marked as held, pending your action to acknowledge.

Click Annual, and you are now ready to acknowledge this review. Again, you can enter comments until Annual Phase.

Click Acknowledge

Click expand all to review the entire document.

One thing that users have found very helpful are the instructions at the top of the page, which will walk through the procedural steps of the Performance Review process.

Once you have reviewed the document, please click Acknowledge Review.

Click OK

17:49

This review has been acknowledged. We are now ready to move past the interim 2, and on to the Annual Phase of the process. In this phase, you will be able to enter your comments. The process will be very much the same, however you will be able to enter comments at this phase.

You will receive an email notification when the annual phase of the document is available for your review.

You would navigate to the Current Documents page, as we have before.

Please click Annual

This document is available for review, and just as before you can not yet acknowledge this review because the review has not yet been marked as held. Please click View to see the full performance document.

Click Expand All

You will now see an End of Cycle outcome rating and Justification under Section 2. These can be found under each work outcome statement used. Below the additional work outcome statements (left blank for this example), you will notice two additional sections.

19:16

You will see section 3, which is the overall performance rating.

In this example, the rater selected valued performance.

In section 4, the rater overall rating justification, was provided here. Please review this before your meeting with your rater. You'll also notice the audit history at the bottom of the document, and if any attachments were added, you would see those in that section.

If you have any trouble opening attachments, a helpful hint is to press the CTRL key while opening an attachment. This will override any popup blockers that you may have active.

20:00

Let's return to the document detail. In the real world, we will have our face to face meeting with the rater, they will mark that the review has been held, then we will be able to acknowledge the review where my cursor is right now.

We will do the time machine once more, and we will go to a place where we have had our face to face meeting and we are ready to acknowledge this review.

You have received an email notification letting you know that the review has been held. This is ready for you to acknowledge.

At this point you will be able to enter your comments to the review.

Please click Annual.

Please Click Acknowledge, which will take us to the performance review.

Click Expand All to see all the fields that were populated.

21:00

As we saw before, you will see the outcome rating and justification for each work outcome statement

If you go to the bottom of the review document, you will see that Section 3 – Overall Performance Rating is populated, as well as the justification in Section 4.

21:25

Below that, you will see a new field, which is available for your Employee Comments. This is your very own section where you are able to make any end of cycle comments to be attached to your review.

You will notice as we move toward the bottom of the page that we have all of the steps outlined in the audit history section. Each of the specific transactions is itemized with a time/ date audit stamp.

At this time we are ready to acknowledge the review. Let's go ahead and click that at this time.

22:00

Please click OK

You have now acknowledged this review, and move past the Annual phase of the review.

One additional item that we would like to cover with you, is that now that you have finished this document and it has finalized, we wanted to be able to show you where you could review any historical documents.

So, moving forward, you will be able to review all of your performance reviews in Edison in once place.

The navigation you will follow will be Main Menu > Employee Self Service > Performance Management > My Performance Documents > Historical Documents.

If you do have any questions about this process, please see your rater, which is your supervisor, or your performance management coordinator within your agency.

For any other questions, we are happy to help, please call the Edison HelpDesk at (615) 741 HELP (4357).

Thank you for your attention today, and we hope that you found this webinar helpful.