Rater Webinar Transcript:

Hello and welcome to the Edison Webinar for Performance Management Enhancements. This particular webinar will focus on the role of the Rater.

In the past, you would have known the role of the Rater as the Supervisor. From this point forward, we will reference this role as the Rater.

There are also accompanying webinars for the 3 other roles that participate in the Performance Management Process. The other three roles that are participating are the employee, the reviewer, and the agency appointing authority. In addition to these webinars, we have also made available an 8 page Quick Reference Guide for your reference (posted on the Edison Portal).

1:10

Page 8 of Quick Reference Guide –

We will go ahead and bring that document up on the screen right now. You will notice that on the last page (page 8) of the Quick Reference Guide we have a helpful diagram. You may notice that this diagram is in landscape, so it may be difficult to see in the webinar. We made this so that you could print it out and have it for your reference. It will step you through, step by step, the entire process. This diagram covers all 4 participating roles, identified by the appropriate 'swim lanes'. These roles are (from left to right) Appointing Authority, Reviewer, Supervisor (Rater), and Employee.

1:50

I will go ahead and scroll to the 1st page of the Quick Reference Guide at this time.

We suggest that you download this document so that you can see it a little clearer than just from the shared screen on the webinar. (found on Edison Portal – Training Tab). There are a couple things we wanted to cover on this document. At the bottom of the page, you will see a diagram with some arrows.

We wanted to cover this diagram, as this process will be very important to what we are covering today. The black arrows signifies that the performance documents have been created to initiate the process. Either through mass creation, or individual creation by agency, before you begin the process as a rater, the documents will have been created. There is nothing that you will need to do as the rater to initiate the creation of these documents.

The next step of the process will be the Individual Performance Plan, Followed by the Interim 1, Followed then by the Interim 2, and then the Annual.

If you participated in this process in prior performance management cycles, these steps are going to be very familiar.

In the old world, you would have done one document for the IPP, another document for the Interim 1, another document for the Interim 2, and yet another document for the Annual. That sounds like a lot of documents.

What we have done with the performance management enhancements is take all of the separate documents and turn them into one sequential document that will go through all of the steps together.

This will make it easier for agencies to track these documents, and see which step of the process they are.

3:25

An additional thing that we would like to cover as a part of this quick reference guide, is something that we put on the first page, and that we always think is a helpful addition to any training document, is "How do I get there?"

You'll notice that the first role included on the 'helpful navigations' is you, the Rater (Supervisor): I'm Highlighting this at this time.

3:43

You will be navigating to the current documents page, which can be found at Manager Self Service > Performance Management > Performance Documents > Current Documents

We thought that it was really important today to show you what this process looks like in the actual Edison system.

We will show you the screens from the beginning to the end of this process, as you participate, as the Rater.

4:30

You will notice on your screen that it will show you the pages, just as if you just logged into Edison.

At the top of the page, the way to get started is to click the Main Menu Link

This will bring up some additional options for you.

Please Click Manager Self Service

You will then Click Performance Management

Performance Documents

And then, Current Documents

You can see this navigation across the top of the Page.

You will see that there is only one document on your Current Performance Documents Page

5:26

You will see all the documents for your employees that you are ready to begin/ continue working on.

This is one is for Alex Green. It will give you his Name, Employee ID, Business Unit, Begin/ End Date, Job Title, Current Status, as well as the Document Type you will be working with.

Let's go ahead and click the annual hyperlink. You will notice that this is blue and underlined, which indicates that it will take you to a new page.

5:50

This will take you to the Document Details page for this particular Performance Management Review.

You will see on this page that it lists the Employee Name, Document Type, Job Title, performance review period, the Status. It will also indicate the Rater (supervisor), which is you in this scenario. One additional helpful field is the Document ID. This can be a helpful identifying number for the Performance Review, in case you are having any issues or need to identify to another which performance review you are referencing.

The Status is that you have not started. This is just for this particular example in the Webinar.

We would like to reiterate that we are going through the process in Edison. DOHR has some great training materials that will help you to further understand the Performance Review Process. If you do need that information, make sure that you are speaking with your Agency Performance Management Coordinator. Make sure you have gone through any DOHR training materials on the Performance process.

7:30

The next action that we are going to do, is that we are going to go ahead and start this document. This will be the first time that we have seen the new performance document in this recording. Please click the Start Button.

The performance document will include some helpful identifying information at the top of the page.

In your quick Reference Guide, we did list the instructions that are available on the top of the Performance Review. You cannot do anything with the instructions, but the reason why we put those on the document, is that these are the instructions throughout the entire process, and we wanted to make these available on the actual document for your reference. There is nothing additional that you need to do with these instructions other than review them and follow the process that they indicate.

8:30

If you scroll down the page, you will see that it does give you the sections that are available on this document.

One really helpful thing to do before you do anything else on the Performance Review is to click the Expand all button. You will notice that this opened up all available fields.

The system has available up to 6 work outcome statements for your use. Please reference DOHR and agency policy on completing these items. You do not have to use all 6 work outcome statements. You will only fill out the work outcome statements you need, and leave the others blank.

9:00

This document also has the ability to add attachments.

And, one additional field that we will continue to hit on is the Audit History. Now you'll notice that there is no audit history thus far, because nothing has occurred thus far. As we move through the process, each individual step will be populated with who completed each item, as well as including a date/time stamp for each individual item.

9:51

Another helpful thing that you might find on this page is the Due Date for each section of the Audit History. As we are working on the Individual Performance Plan, you will see an accompanying due date of 12/1/13 for this exercise example.

As we move down the page, we will have subsequent due dates for the Interim 1, Interim 2, and the Annual Phases of the document.

10:13

Let's go ahead and scroll back up to the top of the page to the work outcome statements and you will notice that in section 1, you can add your agency operational and strategic goals.

Let's go ahead and enter our Agency Strategic & Operational Goals

10:31

Click Add Agency Strategic and Operational Goal

You will then be able to click the Search link

You will notice that we have some template information populated for this example.

We will select the three template strategic and operational goals.

You can click select all, or click them one by one.

Please Click Save Selected goals to populate these goals on the performance managmenet review.

You will notice that these six goals have now been populated in section 1 of the document.

This will influence the rest of the decisions throughout the rest of the document.

Let's go ahead and scroll down to section 2.

You will notice one very important button in this section.

12:10

You will notice a pencil on the right side of the page

I have included this in the quick reference guide as well. Think of this pencil as an edit button. It will show you which fields are available to edit, and upon clicking, this icon will allow you to modify that section.

Because we are on the IPP phase of the process, you will notice that the pencil is directly beside the work outcome statements and action steps.

12:45

You will see that there is no pencil beside the interim 1 and interim 2, because we have not yet reached that phase. Once you reach those phases, you will see the pencil.

Let's go ahead and click the pencil on the first work outcome statement.

13:30

For the purposes of this particular training webinar, you will see that we have 'magically' populated a work outcome statement and individual action step for this example. Please reference your DOHR training materials, or contact your performance management coordinator if you have any questions about this part of the process (what you should fill out with).

You will notice that there is also a Supports dropdown. This will be very important to select which of the Goals available on the dropdown this particular outcome statement supports. For this particular example, let's go ahead and say that this supports Strategic Goal 1.

Once you have entered, please click Update.

14:35

You will now notice that under Section 2, Work Outcome Statements/ Action Steps, the information that you entered by clicking the pencil icon has now been populated.

Interim 1 and Interim 2 are both blank because we have not yet reached those steps of the process.

I'll go ahead and scroll to the top of the page to show you what we have done thus far.

15:00

You can save the document throughout the process by clicking the Save button at any time. Section 1 was where we were able to populate out Strategic and Operational Goals

Section 2 is where you will enter your work outcome statements and associated action steps. You will you use your pencil to edit this section.

This document will allow for up to 6 work outcome statements.

If you did have an attachment, you could add that attachment on the document, but we will not be displaying that as part of this example today.

16:00

You will see that there is no information on the audit history because those steps are yet to occur. We will display the full audit history process as we move through the document.

We could save this document if we would like to work on it later, but let's go ahead and hit submit for approval.

If we made a mistake at this point, we could hit cancel.

Let's go ahead and hit Submit.

You have successfully submitted your evaluation.

We are now ready for the reviewer to look at this document.

One additional thing that we wanted to discuss was the Edison Notifications (emails), If you are having trouble receiving Edison email notifications there are a few helpful hints to check. You can take a look at your email address populated in your My System Profile, which can be found under the Main Menu Link. You can also check your spam folder in your email, and make any changes to your spam filters.

If you are receiving your email notifications, you would receive an email notification showing you that this document has been successfully submitted as it went to the reviewer.

We have gone ahead and made the approval by the reviewer, so that this document could be available for review by the employee.

18:00

In the real world, the employee is going to look at that document, think about it, you will then have a face-to-face meeting, and in that meeting you will discuss the performance review.

Let's go ahead and click the annual document at this time

18:15

You will see here that the document is now ready to be marked available for review.

This will allow the employee to see the document, as covered in the employee webinar.

Click Mark Available

You will see that it took us back to the Performance Document – Annual

As we scroll down the page, you will see that the fields are closed, if you would like to open them all up please click Expand All.

This will be the first time that we see that the audit trail begin to populate

Let's go to the bottom (can also be found at the top)

It now says available for review. By clicking that link, we will make this document available for the employee's review

19:30

Are you sure you would like to do that? If so, please click OK, but you can click the cancel button to move back to the document.

Click OK

This is available for review by the employee now

The employee can then go into the system and see the performance review and see everything that was entered (outcome statements/ action steps).

Once you have had your actual meeting with your employee, then you will click 'Mark Review Held'

20:07

Click Mark Review Held at this time

You will see that the 'Review Held' button is available at the top and bottom of the page.

Are we sure? Please click OK

You will now see that the status of the document now indicates that the review has been held.

You will notice on your page, that you now see a submit button instead of an acknowledge button.

What we have done is behind the scenes, we have had the employee go in and acknowledge this review themselves. This is best practice, but you can acknowledge a review on the employees behalf as well.

We will show this in one of the later steps how we would do this if your employee was unable or unwilling to complete the acknowledgement.

21:10

We are now done with the IPP part of the process. Following the IPP will be the Interim 1. Previously we would have had to start this process from the beginning, but now you are able to seamlessly transition into the next step of the process.

We hope that you find this as an easier way of doing business.

Go ahead and click the Submit button to kick off the Interim 1 step of the process.

Each phase will contain the same steps as the other phases covered in this training document

22:30

Clicking the expand all link, will allow you to see all of the populated sections

Under section 2, you will now be able to see that the edit (pencil) icons have now moved to the Interim 1 section of each work outcome statement.

That means that these sections are now available for edit.

You will also see that the audit history, will show you the full history of the steps of the Individual Performance Plan phase of the process.

If you were going to acknowledge for the employee, this would show your name on that portion of the audit.

You'll notice that the next step is the Interim 1

23:30

The due date for this example is 3/14/14

You can reference your operational/ strategic goals once again at the top of the document.

23:45

We are now ready to edit for work outcome statement one, under the Interim 1 section.

Please click the Edit (pencil) icon for the Interim 1 section under Work Outcome Statement one.

You'll notice that under rater comments we can enter the comments for the interim one review.

Please follow your agency specifications on what to enter here, and if you have any questions please see your agency Performance Management Coordinator or DOHR training materials.

24:20

Click Update

You'll notice that under Work Outcome Statement 1, this comment has now been populated.

You will see at the bottom and top of the page we can see Submit for approval. Each button is identical.

Click submit for approval to have this workflow to the reviewer.

25:00

Please Click Submit

You have successfully submitted your evaluation, so the next step will be the reviewer approval, followed by marking this 'available for review' for the employee.

We will go ahead and do the reviewer approval behind the scenes.

25:30

The last step that we did was that the reviewer has now approved these comments. We can now go to the annual document, and mark this as available for review for the employee before you have your meeting.

You will receive email notifications when any action is pending your action.

Please Click Mark Available.

26:15

You'll notice at the top of the Performance Document, you can see that the Available for Review button is available. Let's go ahead and click that at this time.

If we had shown the audit, we would have seen every step that had occurred up until this point.

Please Click OK

26:31

The employee will now receive an email that they are ready to review the document.

Go ahead and say that you have had your meeting with the employee, and mark Review Held.

On the performance Review document, you will see the review held button is now available at the top of the page.

You may remember on the old document that there was a place for the 'date of discussion'. In the new document, this field is replaced by a date/time stamp of the Review Held button being pushed. It is very important to mark the review as held as close to the meeting as possible, as this will be recorded as the date of discussion in this document's history.

Please click Review Held at this time

Please Click OK

28:00

Now it is time for the employee to acknowledge this review.

Previously, we logged in off-line as the employee to acknowledge this review. But, there are circumstances where the employee is either unable or unwilling to complete this action. In this example, we want to show you how you can complete this action on their behalf.

28:20

Click the Acknowledge Button under the Next Action Column at this time

You will notice that acknowledge review is now at the top of the page.

This is saying that the meeting has occurred.

Let's click acknowledge review

28:49

You will see here that we have two options to acknowledge this document for an employee.

These options are Manager Override and Employee Refusal.

An employee refusal will require approval by the Reviewer.

Let's select manager override and then click OK.

You will notice that the performance review document has now been marked as acknowledged, and you will see this on the audit history.

29:11

We have now finished the Interim 1 review

Let's go ahead and kick off the next step (Interim 2), and Click Submit

Helpful Hint: Click the Expand all button to open up all sections of the document

You'll notice that your interim one comments have been populated, and the edit (pencil) has moved to the Interim 2 section.

Let's hit that edit pencil at this time.

We will enter default text for this exercise

30:15

Please Click Update once you have entered your comments for the interim 2.

You will see that these comments have been updated on the performance review document.

As we scroll down the page to display the audit history, you will see that the steps under the Interim 1 phase have now been populated, and you will see a due date for the Interim 2 phase.

We can see under the Acknowledged section of the interim 1 phase, we can see where the acknowledgement was completed by Billy Dalton (which is who we are in the exercise as the rater/ supervisor).

30:45

Once we have gotten our comments for all work outcome statements used, we will submit that for approval

Please click submit

You will notice that we have successfully submitted this evaluation.

We will complete the approval of the reviewer at this time

Through each step you will receive email notifications.

We are now ready to mark this as available for review, so that you can have your meeting.

31:30

Please click the annual link to mark this document as available for review

You will see that the Mark Available link is now available on the right side of the page, following the approval by the Reviewer.

Please click Mark Available at this time.

31:54

On the performance review, you will notice that the available for review button is now available.

Please click Available for review at this time.

Please click OK

You have successfully made your evaluation available for the employee's review.

The employee will now be able to view the comments that you entered.

Please click Mark Review Held

You will then click the review held button as soon as possible after your face-to face meeting as possible.

The time date and audit stamp will record the time that this is pressed.

You will notice that it is now time for the employee to acknowledge the review.

To save some time, we will go ahead and acknowledge the review on behalf of the employee again for this example.

33:10

Click acknowledge review

If you do click Employee Refused, then this will require Reviewer approval

Please select Manager Override for this example, and then Click OK

33:35

It is best practice for the employee to acknowledge their own review

You will notice that we have successfully acknowledged the evaluation.

We began with the IPP, moved to the Interim 1, then to the Interim 2, and now we are ready for the Annual Phase, which will open up a few fields that we will cover.

Let's go ahead and hit the submit button to begin this Annual Phase of the process.

34:19

As we have done before, let's click the Expand All link to open all the sections for the Performance Review

As we scroll down the page, you'll notice that under section 2, we can now see several new fields.

We can now see the End of Cycle Outcome Rating section, as well as a section available for the Outcome Rating Justification.

34:40

You will then go in and select from the 5 available outcome ratings. If you have any questions about these ratings, please see your agency performance management coordinator.

There are 5 ratings that you can choose from, from Unacceptable, Marginal, Valued, Advanced, and Outstanding. Let's Choose Valued performance and Select Proficiecy

35:20

Notice that we have now selected Valued Performance and we would like to provide a Justification Description on why we chose this rating for this Particular Work Outcome Statement.

Again, follow DOHR specifications and your agency processes on the outcome rating and justification.

You would need to populate these fields for any work outcome statements that you used. For any work outcome statements that you left blank, those will not be modified.

36:00

If we scroll to the bottom of the page, you will notice two additional fields

In section 3, you will be able to provide an overall performance rating.

Please click the icon next to that section to make your selection.

Values of Unacceptable and Outstanding will require Appointing Authority approval.

For this example, we will select Valued Performance.

Once you have made your selection, please click Select Proficiency

36:45

You'll notice as we move down the page, that you can see that we have populated section 3, and we can also enter our overall rating justification in section 4.

There is also a field in section 5, that is not yet editable, for Employee Comments.

Once they go in, they will be able to any comments and responses to the review.

Once more, you will see the audit at the bottom of the page.

Now that we have entered the outcome rating justifications, the overall outcome rating, and the justification, let's go ahead and submit that for the reviewer

Please click submit.

There is no action under the next action, that is because the reviewer has not yet approved that.

Let's take care of that behind the scenes.

38:15

Now we will go ahead and more through the rest of the process.

Go ahead and click the annual link.

38:35

You will then click Mark Available for Review on the right side of the page

Once more, you will see the top of the performance review document

As always, clicking the expand all link will allow you to see all available sections of the Performance Review document.

You will notice that the available for Review button is now available

Let's go ahead and click the available for review button.

Click OK

38:53

You will now notice that the document is now available for review so that the employee can go in and review this document prior to the annual face-to-face meeting between employee and rater.

Once you have had that face-to-face meeting, please select the Mark Review Held button.

Let's go ahead and click Review Held on the Performance Document at this time.

Again, it is very important to do this as close to the meeting as possible, as this is the field where the 'date of discussion' is stored on the audit history.

39:30

Click OK

You'll notice that the acknowledge button is now available.

We will have the employee acknowledge this review offline

39:50

When the employee has acknowledged, this is the time that the employee will enter their comments for Section 5.

Click Annual

The next action will be to complete the evaluation.

Click Complete.

You will see the full performance review. (click expand all to see all available fields)

You will now see the employee comments

40:30

Once we are ready, we will click complete to finalize the document.

Please click complete.

The only action we need to do is click complete once more.

This evaluation has been finalized and marked as complete.

The status of this performance review is now completed.

41:15

Using the navigation of Manager Self-service > Performance Management > Performance Documents > Historical Documents, you will be able to see old performance management reviews entered in Edison.

We hope that this webinar has been helpful for you. Please note that there are also webinars for the appointing authority, employee and reviewer as well as a Quick Reference Guide.

If you have any questions, please see your agency's performance management coordinator or feel free to contact the Edison helpdesk at (615) 741 HELP (4357).

Thank you again for your participation on this webinar, and we hope that you have a wonderful day.