

Appointing Authority Webinar Transcript

Hello and welcome to the Edison webinar for Performance Management enhancements. Today we are excited to talk to you about the Appointing Authority role or anyone containing the Appointing Authority role. There are some enhancements that we have done to the Performance Management system and we will cover those throughout the webinar today. We'd also like to show you a quick reference guide that you can find posted on the Edison portal, along with three other Edison webinars regarding the Performance Management process. Those three additional webinars will cover the Employee, Rater, Reviewer, and of course, this is the fourth webinar for the Appointing Authority role, or anyone containing the Appointing Authority role.

00:45

Without further ado, let's go ahead and bring up on the screen the quick reference guide we put together for your reference. This is an 8-page document and there is no need to go through the full document at this time – but we thought it would be helpful for you to have it in front of you. At the bottom of the page, you will notice that we outlined the performance process. As part of the performance process, these documents will either be mass created by Edison, or individually created by the agency Performance Management (PM) Coordinator. You will see that in the black arrow on the left side of the page. Immediately following that, individuals will complete an Individual Performance Plan, followed by an Interim 1, Interim 2, and finally, the Annual document. Previously, in the system for those of you all who have done this before, you would have known that these were all separate documents within the system. One of the biggest enhancements that we've done as a part of this Performance Management process is that we were able to combine these into one document. We hope that you find this helpful, and an easier way of doing business.

01:55

One of the other biggest enhancements, specifically for the Appointing Authority, as far as making your job easier, is that now you are only required to approve those documents that have an overall rating of 'Unacceptable' or 'Outstanding.' Ratings of 'Marginal', 'Valued' or 'Advanced' will no longer need your approval. We hope that this is a more efficient use of your time, and that you will be able to look over the unacceptable and outstanding performance reviews before they leave the shop. Those will be work flowed to you and you will receive an e-mail notification when those approvals are awaiting your approval.

02:34

What we are going to show you today in the system is how you will process that approval and what that document will look like in the system with all of these stages combined. Another thing that we would like to point out on the quick reference guide – if you follow my cursor where the red box is on the left, we wanted to include one helpful navigation for you as the Appointing Authority. The page that you are going to use in the system to get to your Performance Management documents, as far as approvals go for the Appointing Authority, will be the navigation: **HCM > Workforce Development > Performance**

Management > Approve Documents. Again, we are going to show you what this actually looks like in the system, so there is no need to write this down now. But, it would be helpful for you to download this quick reference guide from the Edison Portal and keep it for your reference.

03:21

You will now see on the screen that we have logged into Edison. For those of you all who use Edison as part of your daily duties, this should be a very familiar page. For those of you all who do not use Edison, we want to give you a brief introduction to the page of how you will navigate. On the top left of the page, you will notice where it says Main Menu. The first thing you will need to do is to click that link to open up additional options. Then you will follow the navigation that was on the quick reference guide that I previously mentioned. You will first click HCM. You will notice that opens up a window on the right which will give you some additional options. You will then choose Workforce Development, followed by Performance Management, and then you will go to the Approve Documents screen. One thing that we wanted to bring to your attention is that if you do not see any of these navigations, most likely, there is a security issue. In other words, you probably do not have the Appointing Authority role, or any other security role you would need to access these pages. If you do have the Appointing Authority role, you should be able to see the navigation thus far. If you do not, you may want to see someone in your HR department, and file a security form to Edison. Then, we will be able to get this updated for you. Please click Approve Documents to get to the Approve Documents screen at this time.

04:49

You will now see that we have had our screen split for the purposes of explaining the navigations so that you can see the navigation we have gone to. If you follow my cursor at the top of the page, you will see the navigation of HCM > Workforce Development > Performance Management > Approve Documents. On your quick reference guide, you will notice that the same navigation that you will use consistently will be on here. After we have navigated to the Approve Documents page, you will notice that we can see a document on the page where I am highlighting right now. This document is one Alex Green. You would have received this document because this was either an overall rating of 'Unacceptable' or 'Outstanding.' Again, ratings of 'Marginal', 'Valued' or 'Advanced' will not show up on your approvals any further.

05:43

Let's go ahead and click where it's blue and underlined. That is a hyperlink to get to the performance document approval screen for one Alex Green. Let's go ahead and do that at this time.

05:54

You will now see on your screen that we have maximized the screen to show the full Approve Transactions page for the document for Alex Green. If you follow my cursor on the screen, you can see where the blue name is. This is for the employee who the evaluation is for. You will see their employee ID on the top right of the page for your reference. You will be able to see the document type, the

author here (who is the rater), the period begin date, the period end date for this particular evaluation, and the overall rating which was 'Outstanding Performance.' Again, only ratings of 'Unacceptable' or 'Outstanding' will require your approval.

06:36

An important link to remember on this page will be the Performance Document Details link. The reason that this is important is because it will actually take you to the full Performance Management review. If you click on that link, it will take you to the review, and you will be able to see why the rating was outstanding, or why it was unacceptable. This will be important before doing any additional steps, making any additional comments, and of course, approving or denying this document. Please click Performance Document Details at this time.

07:08

You will notice that there is not a whole lot of information on this page as we look at it now. It may look like an incomplete evaluation. One of the easiest things we can do to see all of the information on the evaluation is to click the 'Expand All' button where my cursor is now. The 'Expand All' button will open each individual section throughout the document. Of course, you could open each individual section by clicking the arrow on each one. But for the purposes of this, we will go ahead and click 'Expand All' and will be able to see the full document – what was entered by the rater, any comments entered by the employee, and make our decision whether we want to approve or deny this review. Additional information on this will include the employee ID, department, location, business unit; also the rater, status, approval status as well as the particular document ID. This document ID is a very helpful number if you do have any issues with the Performance review to let Edison or anyone else know the document you are referring to. Let's go ahead and click 'Expand All' at this time, and we will review the document.

08:19

As we scroll down the page, you will see the Strategic Goals and Operational Goals. In section 2, you will see the Performance Planning, Observation and Feedback. In this section, you will be dealing with the Work Outcome Statements. You will notice that this will show you each step of the review. You will see the Individual Performance Plan will be included at the very top. You will have the Interim 1 – any interim comments entered here are by the Rater where my cursor is now. You will also have the Interim 2. Below that, you will also be able to see the End of Cycle Outcome Rating for that particular outcome statement as well as any particular justification. As we scroll down the page, you'll notice that there are six work outcome statements at your disposal, or your agency has at their disposal. These six outcome statements are not required. If you choose two work outcome statements, you will leave four work outcome statements blank. If you choose four work outcome statements, two will be left blank. There is no mandate that all six need to be used, however, all six can be used for your agency.

09:33

We will show on the screen the spaces where all work outcome statements can be recorded. As you are going through these, there is nothing you need to enter as the Appointing Authority through these work outcome statements. This is what the Rater will be responsible for and will be going over with the employee through the process. We'll show you from the top of the document down once more.

10:02

You'll notice that we've reached section 3 and section 4. These were available on the Annual phase of the document. This is the overall rating, and the overall rating justification. This is what triggered the workflow to go to you as the Appointing Authority. You'll notice that the rating for section 3 was 'Outstanding Performance.' So the employee is doing, as they said, an outstanding, wonderful job. You'll notice here that under section 4, a justification must be provided and you will look at this as part of your review. Please reference DOHR's training materials as far as this review process. If you do have any questions about this, please see your Performance Management Coordinator within your agency or reference the Employee Relations Division within DOHR. If you do have any other questions related to Edison, we'll be able to help you out with any of those. Please call 615-741-HELP. That's 615-741-4357, and we'll be able to answer these as best we can for you, or get you in touch with someone else who can answer your questions.

11:14

You'll notice as we go down the page, you'll see section 3 – the Overall Performance Rating, section 4 – the Rater Overall Rating Justification, and section 5 will be available for the End of Cycle Comments for the employee. Any attachments can be put under the attachments section. You'll notice that none have been added to this document. But, if any have, you may want to review those. A helpful hint for opening those documents – if you do have a popup blocker, holding down the 'Control' key while clicking the attachments will help the document to open if you're having any trouble opening the document.

11:46

For those of you who have done Performance Management reviews in the past as the Appointing Authority, you will notice one significant change at the bottom of the page. We have added an audit history. This audit history will take the document (the review) through the entire Performance Management process. You'll notice that each stage within each individual phase is recorded under the Individual Performance Plan, Interim 1, Interim 2 and Annual. It also includes any applicable due dates. This is a great way of tracking down where a document is, and finding out the last one to approve that document was so we can see who has the next step. You'll notice down at the bottom, the last box is not checked is 'Approved by Appointing Authority'. It's waiting for us to do this, and once we approve this or deny this, it will show our name and a date and time stamp of when we approved this. This will become a record as part of the performance review. Once we have reviewed this review to our satisfaction, we will then click 'Return to Performance Document Approval.' Please do that at this time.

12:59

As we scroll down the page, this was the page we first got to through the navigation, as you will see at the top – HCM > Workforce Development > Performance Management > Approve Documents. You'll see that it's the same page we went to before. If you would like to see any comments, which we suggest that you do before you approve or deny this document, please click the arrow where my cursor is now where it says Comments.

13:22

You'll notice that this was Approved Annual as Reviewer, and it will show the User ID and when this occurred. You'll see that Michael Lewis, the ePerformance Approving Manager is the same individual as where my cursor is. Again, this will give a date and time stamp for each approval throughout the process.

13:43

We mentioned this earlier in the recording, but one thing we wanted to emphasize was the notifications. You will not have to go to the Approve Documents page every day to see if you have any of these waiting out for you. That would certainly not be efficient. You will receive an e-mail notification to your e-mail address designated in Edison that will let you know that this is awaiting your approval. You will then be able to go to this navigation and make your approvals, as appropriate. If for some reason you are not receiving e-mail notifications, call the Edison Help Desk, or you can go to your Main Menu, go to My System Profile, and make sure your e-mail address is accurate or review any spam settings that you may have in your internet provider (your internet e-mail provider, which is most likely Outlook).

14:28

Once we are ready to approve or deny this document, we will likely want to make a comment at the bottom of the page. Please follow DOHR's specifications as far as the review process. Again, you can reference your agency Performance Management Coordinator, contact the Employee Relations Division within DOHR or you can always call the Edison Help Desk. Comments by the Appointing Authority will be entered here. Again, these comments will become part of the record of the document. So please be very careful about what you put in the comments section.

15:08

We will go ahead and approve this document since it did meet our specifications for this particular example. Let's go ahead and click 'Approve' at this time. You'll notice that the save confirmation shows that this was successful, and we have successfully approved this document. You'll see here that your name here, the individual we used for this example – one Paul Brown. You'll notice that this was approved by the agency Appointing Authority with a date and time stamp.

15:37

Thank you for your time and attention on this webinar regarding Performance Management enhancements, specifically for the Appointing Authority. If you have any additional questions, please call the Edison Help Desk – they can be reached at 615-741-4357, reference your agency Performance Management Coordinator, or you can contact the Employee Relations Division within DOHR. Thank you very much for your time and attention today, and we hope you have a wonderful rest of the day.