



PeopleSoft 8.00.01 Human Resources PeopleBook

Managing Performance (USF)

PeopleSoft 8.00.01 Human Resources PeopleBook: Managing Performance (USF)

SKU MAHRAr8SP1B1200_4

PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

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MANAGING PERFORMANCE (USF)

This book, *Managing Performance*, documents how you'll set up and use your PeopleSoft system to manage employee performance data. This functionality is designed for users of PeopleSoft Human Resources for the U.S. Federal Government.

You can order this online book by requesting PeopleSoft 8 SKU HRB8SP1R0. You can order this book in hard copy by requesting SKU MAHRBr8SP1B 1200.

CHAPTER 1

Setting Up Performance Management Tables

As an employee relations specialist, one of your primary concerns is ensuring consistency and fairness in employee appraisals. With PeopleSoft Human Resources, it's easy to set up and maintain mandated employee appraisal and rating structures. You'll increase the timeliness and consistency of your data and gain flexibility in performing all of your appraisal tasks.

Central to having a highly-motivated workforce and a fair and equitable employee recognition system is a solid, well-planned Performance Management System. Your PeopleSoft Human Resources system makes this goal easily attainable by providing all of the functionality that you need to create multiple rating scales for different segments of your serviced population as well as different rating types.

A great feature of the Managing Performance application is the ability to create performance plans and establish a library of them that can then be tied to specific positions and modified to fit the actual incumbent of the position. This enables your agency to create performance plan benchmarks that can be adapted to meet the specific needs of supervisors and employees without having to re-enter standard information. This feature also makes it easy to create and maintain union-negotiated plans.

Before you perform Managing Performance tasks, you'll find it helpful to establish codes for various types of information, such as employee review rating scales and performance plans. These codes will enable you to establish standards that you'll use in the employee appraisal process.

Setting Up Tables

The tables that you'll use to set up Managing Performance are the:

- Review Rating table
- Merit Scale table
- Performance Plan and Performance Standards tables

The Review Rating Table page is where you set up the models you'll use to determine employee review ratings and tie these models to their Office of Personnel Management (OPM) equivalent ratings. You can create multiple rating models to use as required by your agency's Performance Management plan or as negotiated with your unions.

You'll use the Merit Scale Table page to define groups of employee review result points. For each group, define the method of resolving review points into a salary increase. You can resolve points in terms of amount, percent, or salary points. You can also associate the groups with a review band.



For more information about review rating scales and how to use them to plan salary increases, please review Reviewing Employee Performance.

Use the Performance Plan – Performance Plan page to establish plans for particular groups of employees. Use this table also to define the different aspects of performance plans and assign weighted levels of competency and criticality to these performance elements. Use the Performance Plan - Performance Standards page to create standards for each element.

When you create information in the tables, be sure to enter effective dates that will support the effective dates of any employee records that you create. If you don't, the system will not display all the valid codes when you select from prompt lists in the Manage Performance pages.

Before You Begin

The procedures for accessing and entering information in these pages are the same for updating or adding data in any PeopleSoft component or page.



For more information and a quick refresher, see Using PeopleSoft 8 Applications.

Establishing Employee Review Rating Scales

Use the Review Rating table to set up the types of rating scales that you'll use for employee appraisals and for salary increase plans. You can create multiple rating scales to use in or rotate among different agencies within your organization, in ascending or descending order, numerically or alphabetically.

Use the Merit Scale table to resolve a set of review rating points into a salary increase.

Review Rating Table Page

Usage	Use the Review Rating table to set up the types of rating scales that you'll use for employee appraisals.
Object Name	GVT_REVW_RATIN_TBL
Navigation	Administer Workforce, Manage Performance (USF), Setup, Review Rating Table

Access Requirements	The system prompts you for a Rating Model that the system will use to uniquely identify this scale.
---------------------	---

Review Rating Tbl page (Review Rating Table page)

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBook Standard Field Definitions: **Effective Date**, **Status**, **Description**, and **Short** (description).

The system defaults the effective date to the date that this rating scale first went into effect. You can change that date if you want the rating scale to go into effect today. The default status is *Active*, but you can change that, if necessary. Enter a description and short description for each rating.

When you create a review rating, indicate a level for each rating by selecting an **OPM Rating** value. Enter a description and a short description. The OPM Rating is the Office of Personnel Management's (OPM) equivalent pattern and rating for reporting to the Central Personnel Data File (CPDF) and for Reduction-in-Force (RIF) processing.

Merit Scale Table Page

Usage	Use the Merit Scale table page to define groups of review result points. Each group represents a range of points. For each group, define the method of resolving review points into a salary increase. You can resolve points in terms of amount, percent, or salary points. You can also associate the groups with a review band.
Navigation	Administer Workforce, Manage Performance (USF), Setup, Merit Scale Table
Prerequisites	If you are defining review rating point ranges for review bands, you must first define review band IDs on the Review Band Table page.
Access	Enter a Merit Scale ID.

Requirements

Merit Scale Table

Merit Scale: KPT

Description View All First 1 of 1 Last

Effective Date: 01/01/1980 Status: Active + -

*Description: Points Short: Points

Merit Group First 1-2 of 2 Last

Group	From	To	Amount	*Currency Percent	Rate Code Group	Salary points	Review Band
1	1	10				8	+ -
2	11	20				10	+ -

Merit Scale Table page

You must set up a merit scale if the **Scale Type** of the associated review rating scale is **Review Band**. This table is optional if the rating scale type is **Summation**. This table does not apply if the rating scale type is **Average**. You can review and update scale types on the Rating Scale Table – Rating Scale page.



Note. The Planning Salaries module uses the Merit Scale table as well.



For more information about setting up rating scales and using the Merit Scale Table page to plan salaries for your organization, please see Reviewing Employee Performance.

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBook Standard Field Definitions: **Effective Date**, **Status**, **Description**, and **Short** (description).

- Group** Enter an identifier for the first range of review points that you are defining. The value that you enter here can be either a number or letter, or combination of the two.
- From** Enter the beginning value in the range of review points for this group. For example, your first group could have a range of values from 1–10. Your second group could have values from 11–20 and so on.
- To** Enter the final value in the range for this group.

Amount	<p>If you resolve points in terms of a flat amount, enter the amount that corresponds with this group of points.</p> <p>On the Rating Scale Table you will select the rate code, frequency, and currency that the system should use for merit increases associated with that rating scale.</p>
Currency	<p>Select the currency code associated with the amount.</p> <p>All other fields on this page are unavailable for data entry if you entered an amount and currency.</p>
Percent	<p>If you resolve points in terms of a percent, enter the percent that corresponds with this group of points.</p>
Rate Code Group	<p>If you do not want the percent increase to apply to all of the base rate codes in an employee’s compensation package, select a rate code group to which the percent should apply.</p> <p>This field is hidden if you did not select Use Rate Code Groups on the Installation Table – HRMS Options page.</p> <p>All other fields on this page are unavailable for data entry if you entered a percent and rate code group.</p>
Salary points	<p>If you resolve review rating points in terms of salary points, enter the points that correspond with this group of points.</p> <p>This field is hidden if you did not select Use Salary Points on the Installation Table – HRMS Options page.</p> <p>All other fields on this page are unavailable for data entry if you entered salary points.</p>
Review Band	<p>If you use the Review Band rating scale type, enter the ID of the review band that you want to associate with this group of points.</p>



For more information on salary points and rate code groups, see Working with Multiple Components of Pay.



For more information about using review bands, see Defining Rating Scales.

Establishing Performance Plans and Their Elements

You'll use the Performance Plan Table to establish plans for particular groups of employees. Use this table also to define the different aspects of performance plans and assign weighted levels of competency and criticality to these performance elements. Use the Performance Plan - Performance Standards page to create standards for each element.

Performance Plan – Performance Plan Page

Usage	Use the Performance Plan table to establish plans for particular groups of employees.
Object Name	GVT_PERF_PLAN
Navigation	Administer Workforce, Manage Performance (USF), Setup, Performance Plan, Performance Plan
Prerequisites	Create rating scales in the Review Rating Table page.
Access Requirements	The system prompts you for the name of the performance plan.

Performance Plan: GS020308

Plan Information View All First 1 of 1 Last

*Effective Date: 01/01/1980 *Status: Active

*Rating Scale: A OPM Rating of Record Pattern A

OPM Pattern: Summary Levels 1,2,3,4 and 5

*Description: Personnel Clerk - 08 Total Percent: 100

Performance Elements View All First 1-3 of 3 Last

*Element #	*Description	*Critical Indicator	Factor Weight
01	Maintain Applicant Supply File	Critical	40
02	Process Personnel Actions	Critical	35
03	Quality Assurance	Critical	25

Performance Plan – Performance Plan setup page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBook Standard Field Definitions: **Effective Date**, **Status**, and **Description**.

The default effective date is the date that this plan went into effect. You can change it if you want the plan to go into effect today. The default status is *Active*.

Select a rating scale to associate with this performance plan. You create these scales in the Review Rating table. You can then select a rating scale from the list of valid codes.

The system inserts the OPM pattern that you've set up for this rating scale.

Enter a description of the performance plan.

Next, enter the performance elements that make up this performance plan. Enter an element number (this value must be numeric).

Enter a description of the element.

Select the element's **Critical Indicator**. Designate an element as critical if it is a mandatory requirement for employee performance. All critical elements must have a successful rating for an employee appraisal to be rated fully successful or above.

Enter a factor weight for this element. The total weight for all elements associated with a performance plan must equal 100. If elements are present and the total weight is not 100, the records will not save.

To add more elements, click the **Plus** buttons. You may insert up to 100 elements, zero to 99, for each performance plan.

Performance Plan - Performance Standards Page

Usage	Use the Performance Standards Table page to create standards for performance plan elements. <hr/> To update a performance standard, open the Performance Standards table in correction mode. <hr/>
Object Name	GVT_PERF_STAN
Navigation	Administer Workforce, Manage Performance (USF), Setup, Performance Plan, Performance Standards
Prerequisites	You must create a performance plan on the Performance Plan – Performance Plan page.
Access Requirements	The system prompts you for the name of the performance plan.

Performance Plan: GS020308

Description: Personnel Clerk - 08

Effective Date: 01/01/1980 Active Total Percent: 100

Element #	Description	Critical Indicator	Factor Weight
01	Maintain Applicant Supply File	Critical	40

Standards

Number/Name: 01 Maintain Applicant Supply File

Description: Assists with the distribution of recruiting materials and preparation and posting of job announcements for position openings. The incumbent is also responsible for maintaining and tracking statuses of applications/applicants on file.

Performance Plan - Performance Standards setup page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBook Standard Field Definitions: **Effective Date**, **Status**, **Description**, and **Short** (description).

Using the **First** and **Last** buttons on the **Elements** group box, find the appropriate performance elements for this standard.

The **Element #** (element number) field displays the number of the element. The **Description** field displays the description of the element.

The **Critical Indicator** field describes whether or not an element is critical. Elements are designated as critical if they are mandatory requirements for employee performance. All critical elements must have a successful rating for an employee appraisal to be rated fully successful or above.

The **Factor Weight** field for this element describes the relative importance of the element in conjunction with the others. The total weight for all elements associated with a performance plan must equal 100.

Enter the standards that make up this performance element in the **Standards** group box. Enter a standard number in the **Number/Name** field (this field must be numeric), and give this standard a name.

Enter a description of the standard in the **Description** field.

You may insert up to 100 standards, zero to 99, for each performance element. You may insert up to 100 elements, zero to 99, for each effective date of the performance plan.

CHAPTER 2

Managing Performance

A performance management system must establish plans, elements, and standards that provide for the objective appraisal of employee job performance. During an employee's career, from the initial period of appraisal onward, a supervisor should periodically perform reviews, track employee performance, and give fair and accurate appraisals. And recognizing and rewarding employee performance as a result of consistent appraisals is a critical component of attracting and keeping top talent.

PeopleSoft Human Resources helps you handle with ease the complexity of this human resource area, including performance plan development, establishing individual performance improvement plans, and recording and tracking employee appraisals. You'll enhance the accuracy and objectivity of your measures of performance.

Before You Begin

The procedures for accessing and entering information in these pages are the same for updating or adding data in any PeopleSoft component or page.



For more information and a quick refresher course, see [Using PeopleSoft 8 Applications](#).



Important! Before you can manage employees' performance, you must have already hired them and entered them in the system.

Managing Performance

Most of the information that you use in managing performance is related to the employee appraisal and performance tables. However, some of the position data pages in the Manage Positions, Use menus play a critical part in the management of performance processes.

Using Positions for Creating Performance Plans

The Performance Plan pages are for setting up performance plans and performance standards and exist to facilitate the use of performance plans in the position data.

You must tie a performance plan to a particular position by designating the performance plan and filling in the information on the Position Data - Specific Information Page.

This enables you to apply performance plans in a uniform manner to the positions that you create. It also enables you to track and record employee appraisals, so the Position Data 4 page must be completed before performing appraisals.

To perform employee appraisals, performance plans *must* be linked to a position or job code. An error message will appear if you are attempting to perform an employee appraisal without an associated performance plan in place.



For more information about setting up the Position Data component, see [Creating Positions](#).

Tracking Employee Appraisals

Use the Employee Appraisal component to enter information on employee appraisals. These pages are optional. Use them if you want to track online, detailed, appraisal information.

You can enter comments from multiple reviewers, choose from multiple rating scales, rate employees according to performance plans, and give them a final rating.

The pages in the Employee Appraisal component provide organization for your review data. On the first page, enter rating data, evaluations, and comments. On the second, review elements and standards. On the third, review goals and objectives.



You'll also find the Employee Appraisal pages in the Plan Salaries and in the Plan Careers menus. To enter or review information, you can use the pages in any of the menus, because they are the same pages.

Employee Appraisal - Employee Appraisal 1 Page

Usage	Use Employee Appraisal 1 to review and change basic information on employee appraisals and enter reviewer comments.
Object Name	GVT_EMP_REVIEW1
Navigation	<ul style="list-style-type: none"> • Administer Workforce, Manage Performance (USF), Use, Employee Appraisal, Employee Appraisal 1 • Develop Workforce, Plan Successions (USF), Use, Employee Appraisal, Employee Appraisal 1
Access Requirements	The system prompts you for an employee ID and Employment Rcd Nbr (employment record number).

Employee Appraisal 1 Employee Appraisal 2 Employee Appraisal 3

Rodriguez,Anna Lucia Employee ID: L00001 Empl Rcd#: 0

*Effective Date: 10/05/1998 Review Type: Official Rating

From/To Date: 10/01/1997 09/30/1998 Next Review Date: 10/05/1999

Performance Plan: GS020308 Personnel Clerk - 08

Rating Scale: A OPM Rating of Record Pattern A OPM Pattern: H

Review Rating: 4 Superior OPM Rating: 4 Level IV

Company: DC 02 Bureau of E-Communications Position: L0000034

Department: L1102 Supervisor: Other

Job Code: L0029 PP-Grade:

*Review Level: Approved/Official

Reviewer ID: L00003 Ansel-Hodges,Tamara

Comment: Anna continues to be a valued employee. She continues to excell in all areas and projects assigned to her. She consistently completes her work in a timely

Employee Appraisal - Employee Appraisal 1 page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBook Standard Field Definitions: **Effective Date, Company, Department, Status, Description, and Comment.**

The default for the **Effective Date** field is the system date, usually today's date, which you change unless the appraisal was conducted today. Select the **Review Type**.

Enter the review period date parameters in the **From/To Date** field, and the **Next Review Date** field, if you know them.

The **Performance Plan** field provides the name of the performance plan that you're using. The defaults for the **Rating Scale** and **Review Rating** fields are from the performance plan, but you can change them if necessary. The system displays the **OPM** pattern and **OPM** rating code equivalent.

The system displays the company, position, department, supervisor, job code, and PP-grade (pay plan grade) for the employee as of the review date.

Select a **Review Level** from the list of available values. The translate table populates the **Review Level** is with values such as *Approved/Official, Supervisor/Manager, or Executive Committee.* Enter or select a **Reviewer ID**.

You can enter comments that are longer than the lines shown.



Important! Before performing Employee Appraisals, Performance Plans have to be linked to a position or job code. If an employee appraisal is performed without an existing performance plan, an error message will appear.

Employee Appraisal - Employee Appraisal 2 Page

Usage	Use the Employee Appraisal - Employee Appraisal 2 page to specify whether review elements and standards have been met.
Object Name	GVT_EMP_REVIEW2
Navigation	<ul style="list-style-type: none"> • Administer Workforce, Manage Performance (USF), Use, Employee Appraisal, Employee Appraisal 2 • Develop Workforce, Plan Successions (USF), Use, Employee Appraisal, Employee Appraisal 2
Access Requirements	The system prompts you for an Employee ID and Employment Rcd Nbr (employment record number).

The screenshot displays the 'Employee Appraisal 2' page for employee Anna Lucia Rodriguez. The interface includes tabs for 'Employee Appraisal 1', 'Employee Appraisal 2', and 'Employee Appraisal 3'. The main content area shows the following details:

- Employee:** Rodriguez, Anna Lucia
- ID:** L00001
- Empl Rcd#:** 0
- Effective Date:** 10/05/1998
- Next Review Date:** 10/05/1999
- Job Code:** L0029
- Position Number:** L0000034
- Performance Plan:** GS020308
- Total (%):** 100
- Weighted Avg:** 3.75

Below the employee details, there is a section for 'Critical Indicator' with the following information:

- Critical Indicator:** Critical
- Factor Weight:** 40
- *Review Rating:** 4
- Element #:** 01 Maintain Applicant Supply File Superior

At the bottom, a 'Standard #' section shows '01' with a description: 'Assists with the distribution of recruiting materials and preparation and posting of job announcements for position openings. The incumbent is also responsible for maintaining and tracking statuses of applications/applicants on file.'

Employee Appraisal - Employee Appraisal 2 page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBook Standard Field Definitions: **Effective Date** and **Empl Rcd#**.

On this page, you can indicate how the employee performance relates to the elements of the employee's performance plan. Select the review rating that best describes the employee's performance for each of the elements.

Employee Appraisal - Employee Appraisal 3 Page

Usage	Use the Employee Appraisal - Employee Appraisal 3 page to review and update information on employee goals and objectives.
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Object Name	GVT_EMP_REVIEW3
Navigation	<ul style="list-style-type: none"> • Administer Workforce, Manage Performance (USF), Use, Employee Appraisal, Employee Appraisal 3 • Develop Workforce, Plan Successions (USF), Use, Employee Appraisal, Employee Appraisal 3
Access Requirements	The system prompts you for an Employee ID and Employment Rcd Nbr (employment record number).

The screenshot displays the 'Employee Appraisal 3' page. At the top, there are three tabs: 'Employee Appraisal 1', 'Employee Appraisal 2', and 'Employee Appraisal 3'. The main content area shows the following information:

- Employee:** Rodriguez, Anna Lucia
- ID:** L00001
- Empl Rcd#:** 0
- Effective Date:** 10/05/1998
- Review Type:** Official Rating
- Next Review Date:** 10/05/1999
- Company:** DC 02 Bureau of E-Communications
- Department:** L1102
- Job Code:** L0029
- Review Rating:** 4 Superior
- Rating Scale:** A OPM Rating of Record Pattern A
- Total (%):** 100
- Weighted Avg:** 3.75

Below the employee information is a section titled 'Goals And Objectives'. It includes a table with the following columns: '*Nbr', 'Include From Career Plan' (with an 'OK' button), '*Goal Status', and 'Date Met'. The first row shows an empty box for the number, an empty text field for the career plan inclusion, a dropdown menu set to 'Not Met', and an empty date field. There are navigation buttons ('View All', 'First', '1 of 1', 'Last') and '+'/'-' buttons for the table.

Employee Appraisal - Employee Appraisal 3 page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBook Standard Field Definitions: **Effective Date**, **Company**, and **Department**.

If the employee has a career plan in PeopleSoft Human Resources, click **OK** above the **Include From Career Plan** field to import the short-term goals and objectives from the career plan. Enter any other goals and objectives resulting from the employee appraisal. This field is scrollable, so you can enter text longer than the displayed field space.

Indicate the goal status by selecting a **Goal Status** from the list of available options. If you select **Met** or **Exceeded**, the **Date Met** field will appear and you can enter the appropriate date. Only unmet goals will carry forward to the next appraisal.

When you select a goal status of **Met** and the goal is also in the employee career plan, the system enters a value in the **Date Met** field for short-term goals in the Actual Completion Date field in the Career Plan – Career Goals page. But remember that if you change this information a second time, for example, change a **Met** goal back to **Unmet**, the system will not update the information in the employee career plan again. You'll need to update the date in the career plan manually.

Understanding Employee Performance Improvement Plans

In certain circumstances, an employee's performance may need closer management. Performance Improvement Plans (PIPs) offer discrete and measurable periods for employees to improve their performance, and afford the employee an opportunity to positively address issues that have adversely impacted their appraisals.

Improvement Plan Page

Usage	Use the Improvement Plan page to create a Performance Improvement Plan (PIP).
Object Name	GVT_EMPLOYEE_PIP
Navigation	<ul style="list-style-type: none"> • Administer Workforce, Manage Performance (USF), Use, Performance Improvement, Improvement Plan • Develop Workforce, Plan Successions (USF), Use, Performance Improvement, Improvement Plan
Access Requirements	The system prompts you for an Employee ID.

Improvement Plan

Rodriguez, Anna Lucia Employee ID: L00001 Empl Rcd#: 0

Initial Review Information View All First ◀ 1 of 1 ▶ Last

Effective Date: 10/05/1998 **Review Type:** Official Rating

From/To Date: 10/01/1997 09/30/1998 **Next Review Date:** 10/05/1999

Department: L1102 **Company:** DC 02

Job Code: L0029 **Position:** L0000034

Rating Scale: A OPM Rating of Record Pattern A **OPM Pattern:** H

Review Rating: 4 Superior **OPM Rating:** 4

Performance Status View All First ◀ 1 of 1 ▶ Last

PIP Status: ***Status Date:** 08/25/2000

PIP Start Date: **End Date:** **PIP Completed**

Comment:

Improvement Plan page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBook Standard Field Definitions: **Effective Date**, **Company**, **Department**, and **Comment**.

Select a **PIP Status**. Select *In Progress* for an initial or active PIP. Select *Satisfactory* and *Unsatisfactory* for completed performance improvement plans. The default for the **Status Date** field is the system date, usually today's date, which you can change if necessary.

The system enters the PIP start date and the PIP end date, but you can change the end date, if necessary.

If the employee has completed their PIP, select the **PIP Completed** check box.

You can enter comments that are longer than the lines shown.

Processing Late Employee Appraisals

Processing employee appraisals in a timely manner can be a challenging project. Notifying supervisors, making sure that they have the appropriate forms, and ensuring that they review their employees on time can require a lot of planning and coordination between your Human Resources department and all other departments in your organization. Using workflow, PeopleSoft Human Resources can automate much of this process for you.

A business event identifying employees with late appraisals takes place when an employee does not receive their review on time. When the user triggers the late appraisals process from **Administer Workforce, Manage Performance (USF), Process, Late Appraisals**, a database agent selects all employees who meet the following conditions:

- The last review effective date is on or before the date that the process runs.
- *And* the next review date is before the date that the process runs, or there is no next review date assigned.

If you have workflow enabled, this process will create a worklist entry for all managers whose employees have not yet received a review. The worklist will contain the name of the employee and the date that the review was due.



For more information about workflow, see PeopleSoft Workflow.

Viewing Employee Ranking

The system provides two inquiry pages for viewing how employees rank in terms of compensation within a job code. Both pages group employees by salary plan and show the current ranges for the salary plan and grade. You can use this information to compare compensation to the minimum, maximum, and midpoints for the grade, and to determine whether employees in a job code are being paid equitably in each location.

- The Employee Ranking by Job Code page lists employees by name and employee ID, and displays their location, annual rate, compa ratio, and percent in range. From that page, you can go to the Salary Components page, which enables you to view the details of the selected employee's compensation package.
- The Ranking by Job Code - No Name page lists employee compensation without displaying names and employee ID numbers, to preserve privacy. The page sorts employee compensation by currency in descending order of salary amounts and displays the location, annual rate,

compa ratio, and percent in range.



The Salary Planning module in Global Human Resources uses both of these pages.



For more information about how the Salary Planning module uses these pages, please refer Viewing Summary Salary Data.

Employee Ranking by Job Code Page

Usage	Use the Employee Ranking by Job Code page to view how employees rank in terms of compensation within a job code.
Navigation	Administer Workforce, Manage Performance (USF), Inquire, Employee Ranking by Job Code
Access Requirements	Enter a job code.

Employee Ranking by Job Code

SetID: SHARE **Job Code:** Benefits Specialist
Manager Level: Non-Mgr **Job Function:** Human Resources **Job Family:**
Salary SetID: SHARE **Plan/Grade/Step:** KC02

Current Annual Ranges View All First 1 of 3 Last

SetID	Sal Plan	Grade	Step	Min/Annual	Midpt/Annual	Max/Annual	Currency	Co
SHARE	KC01	Cdn Plan	002					

Compensation Ranking View All First 1-4 of 4 Last

EmplID	Name	Annual Rate	Company	SetID	Location	Comp-Ratio	%Rng
KC0030	Millier,Joseph G	19,500.00	CAD GBI	CANQC	KCQC00		
KC0030	Millier,Joseph G	19,500.00	CAD GBI	SHARE	KCQC00		
KC0005	Moore,Catherine J	10,140.00	CAD GBI	CANON	KCON00		
KC0005	Moore,Catherine J	10,140.00	CAD GBI	SHARE	KCON00		

Employee Ranking by Job Code page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBook Standard Field Definitions: **EmplID**, **Name**, **Company**, **SetID**, and **Location**.

Job Code Description

The system displays the following information about the job code that you selected when you accessed the page:

SetID (set identification)

Job Code

Manager Level

Job Function

Job Family

Salary SetID

Plan/Grade/Step



For more information about these fields, see [Classifying Jobs](#).

Current Annual Ranges

The system displays the following description of the salary plan and grade of the job code:

SetID

Sal Plan (salary plan)

Grade

Step

Min/Annual (minimum annual)

The minimum salary in the grade expressed in annual frequency.

Midpt/Annual (midpoint annual)

The midpoint salary in the grade expressed in annual frequency.

Max/Annual (maximum annual)

The maximum salary in the grade expressed in annual frequency.

Currency

Company



For more information about these fields, see [Salary Grade Table Page](#).

Compensation Ranking

The system displays the following information for each employee. Employees are listed in order from the highest compensation to the lowest.

EmplID (employee ID)

Name

Annual Rate

Company

Currency

SetID

Location

Comp-Ratio (compa ratio)

A calculation that shows where employees' salaries lie in relation to the midpoint range for their salary grades.

%Rng (percent in range)

A calculation that shows where employees' salaries fall within the range set up for their salary grades.



Click this button to access the Salary Components page, where you can view the employee's compensation details by pay component.

Salary Components Page

Usage	Use the Salary Components page to view the details of the employee's compensation package associated with the current Job data row.
Navigation	Click the button on the Employee Ranking by Job Code page.

Points If the rate code type is *Points*, the system displays the number of points defined for this rate code.

Percent If the rate code type is *Percent*, the system displays the percent defined for this rate code.

Rate Code Group If the rate code type is *Percent*, the system displays the rate code group to which the percent applies.

Viewing Pay Components – Changes

Salary Components					
Millier, Joseph G		ID: KC0030	Empl Rcd#: 1		
Compensation Rate: 1,625.00 CAD		Comp Freq: M	Monthly		
Pay Components					
Amounts		Changes			
Rate Code Seq	Change Amount	Change Points	Change Percent	Apply FTE	Converted Comp Rate
NAHRLY	0			<input type="checkbox"/>	1625.000000

Salary Components page: Changes tab

In the Changes tab, the system displays the details of the salary change.

Change Amount If the rate code type is flat amount or hourly rate, the system displays the change amount associated with the rate code.

Change Points If the rate code type is points, the system displays the change points associated with the rate code.

Change Percent If the rate code type is percent, the system displays the change percent associated with the rate code.

Apply FTE This box is selected if you elected to apply FTE calculations to frequency calculations of this rate code.

Converted Comp Rate (converted compensation rate) The system displays the new compensation rate for the rate code converted to the employee's compensation frequency and currency.

Comp Rate Code Page

Usage	Use Comp Rate Code to review detail information on a specific rate code.
Navigation	Click Details on the Salary Components page.

Comp Rate Code

Comp Rate Code:	NAHRLY
Description	Default NA Hourly
	<input checked="" type="checkbox"/> Base Pay <input type="checkbox"/> Use Highest Rate
Rate Code Type:	Hourly Rate
Rate Code Class:	

Comp Rate Code Details page

The system displays the following definition of the rate code from the Comp Rate Code Table - Comp Rate Code Table Page.

Comp Rate Code
(compensation rate code)

Description

Base Pay

Use Highest Rate

Rate Code Type

Rate Code Class

Click **OK** or **Cancel** to return to the Salary Components page.



For more information about these fields, see Comp Rate Code Table - Comp Rate Code Table Page.

Ranking by Job Code - No Name Inquiry Page

Usage	Use the Ranking by Job Code - No Name page to view how employees rank in terms of compensation within a job code. To protect privacy, employee identification does not appear on the page.
Navigation	Administer Workforce, Manage Performance (USF), Inquire, Ranking by Job Code - No Name
Access Requirements	Enter a Job Code and/or Set ID .

Current Annual Ranges						
SetID	Plan	Grade	Min/Annual	Midpt/Annual	Max/Annual	Company
SHARE	KC01	002				

Compensation Ranking							
Annual Rate	Currency	Rating	Company	Location	Grade Date	Yrs Grade	Comp-Ratio % Range
19,500.00	CAD		GBI		07/02/1997	3.2	
19,500.00	CAD		GBI		07/02/1997	3.2	
10,140.00	CAD		GBI		03/22/1985	15.4	
10,140.00	CAD		GBI		03/22/1985	15.4	

Ranking by Job Code - No Name page

All of the fields on this page are the same as fields on the Employee Ranking by Job Code page, with the addition of the following fields:

- Rating** The employee’s review rating.
- Grade Date** The date that the employee entered the salary grade.
- Yrs Grade (years grade)** The number of years that the employee has been in the grade.



For more information about the remaining fields on this page, see Employee Ranking by Job Code Page.

Viewing Position Evaluations by Grade Level

Usage	Use the Position Evaluations by Grade page to compare job evaluation criteria among job codes within each salary plan and grade, and adjust any disparities.
Object Name	GVT_JOB_EVALUATION
Navigation	<ul style="list-style-type: none"> • Administer Workforce, Manage Performance (USF), Inquire, Position Evaluations by Grade, Job Evaluations by Grade • Develop Workforce, Manage Positions (USF), Inquire, Job Evaluations by Grade, Job Evaluations by Grade • Administer Workforce, Plan Salaries (GBL), Inquire, Job Evaluations by Grade, Job Evaluations by Grade
Access Requirements	Set ID

Job Evaluations by Grade						
SetID:	08	Salary Administration Plan: 0000 General Schedule				
Salary Grade:	05					
Current Ranges:	Minimum Pay Rate-Annual	Midpoint Pay Rate-Annual	Maximum Pay Rate-Annual			
	20,588.00	23,675.00	26,762.00	USD		
Evaluation Summary						
						View All First 1-3 of 3 Last
Job Code	Job Title	Total Points	Job Function	Mgr Level	Knowhow	Accountability
L0002	Personnel Assistant (OA)			8		
L0028	Personnel Assistant			8		
L4101	Secretary			8		

Job Evaluations By Grade page

Identifying a Salary Grade

- SetID** This field displays the SetID containing the salary administration plan and grade within which you'll search for job evaluation summary information.
- Salary Administration Plan** This field displays the salary administration plan covering the job codes for which you'd like to see job evaluation information.
- Salary Grade** The salary grade for which you'd like to see position evaluations.

Summarizing Current Annual Ranges

The system displays the following information about the salary grade, as you defined it on the Salary Grade Table setup page.

- Minimum Pay Rate-Annual** Minimum annual compensation in the grade.
- Midpoint Pay Rate-Annual** Midpoint annual compensation in the grade.
- Maximum Pay Rate-Annual** Maximum annual compensation in the grade.

Job Evaluation

- SetID** The SetID associated with the job code.
- Job Code** The job codes in the grade. The system sorts job codes by total points, in descending order. The scores reflect the Classification Standards set up in the Job Code Table.
- Short Descr** (short description) The short description of the job code.
- Total Points** The total evaluation points associated with this job code.
- Job Function** The job function associated with this job code.
- Mgr Level** (manager level) The managerial level associated with this job code.

Knowhow	The system displays the number of points associated with this criterion for this job code.
Accountability	The system displays the number of points associated with this criterion for this job code.
Prob Solving (problem-solving)	The system displays the number of points associated with this criterion for this job code.

You can generate a report providing similar information, Appraisals by Evaluation Points, from the Managing Performance Report menu, (CMP002).

Managing Performance Reports

The Managing Performance module includes two reports to help you analyze your performance data.

- Employee Appraisal Audit
- Appraisals by Evaluation Points



For more information about these reports, see [Managing Performance Reports](#).

CHAPTER 3

Managing Performance Reports

Performance Management reports provide information on employee performance.



For more information about generating these reports, see: Introduction to PeopleSoft Reporting. For a complete listing of all PeopleSoft Human Resources reports by report ID and report name, see List of Reports in PeopleSoft Human Resources.

List of Performance Management Reports

<i>Report Name</i>	<i>Report ID</i>	<i>Location</i>	<i>Global or Local</i>
Appraisals by Evaluation Points	CMP002	Administer Workforce, Manage Performance (USF), Report	USF
Employee Appraisal Audit	PER008	Administer Workforce, Manage Performance (USF), Report	USF

Generating the Appraisals by Evaluation Points Report

The Job Grading by Evaluation Points report lists each salary grade in the organization along with salary data for all titles within that grade ordered by the job evaluation point assignment.

Appraisals by Evaluation Points Page

This is the same page that is used for the Job Grading by Evaluation Points Report in the Plan Salaries (GBL) menu.



For more information about this run control page, see Job Grading by Evaluation Points Report Page.

Appraisals by Evaluation Points Report

Description	The Appraisals by Evaluation Points report lists each salary grade in your agency. It includes all titles within that grade determined by the job evaluation point assignment. Use the evaluation points to assign value to the responsibilities of each job title in your agency and consequently a compensation value to each salary grade. It also includes salary survey information and associated point ratios and midpoints.
Report ID	CMP002
Type of Report	SQR
Parameters	As of Date
Source	RUNCTL_ASOFDATA
Source Records	JOB_CODE_TBL, SAL_GRADE_TBL, SAL_PLAN_TBL
Sorted By	Pay Table, Salary Grade, Total Evaluation Points (descending order)

Generating the Employee Appraisal Audit Report

This report lists by department employees who have completed the review process.

Employee Appraisal Audit Page

This is the same page that is used for the Employee Review Audit Report in the Plan Salaries (GBL) menu.



For more information about this run control page, see Employee Review Audit Report Page.

Employee Appraisal Audit Report

Description	<p>The Employee Appraisal Audit report lists employees who have completed the review process by department. For each employee it shows hire date, employee type salaried, hourly, exempt hourly, job code, and title. For each review, it lists the reviewer's name, review rating, and any action taken as a result of the review. The system calculates an average review rating by averaging all previous review ratings.</p> <p>Use this report as a reminder to schedule interviews.</p>
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Report ID	PER008
Type of Report	SQR
Parameters	None
Source	RUNCTL_PER008
Source Records	EMPLOYEES, EMPLOYEE_REVIEW, REVIEW_COMMENTS

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