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PeopleSoft

PeopleSoft HCM 9.2: Human Resources Manage Employee Reviews

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PeopleSoft HCM 9.2: Human Resources Manage Employee Reviews
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Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft Applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

PeopleSoft Hosted Online Help

You access the PeopleSoft Online Help on Oracle's PeopleSoft Hosted Online Help website, which enables you to access the full help website and context-sensitive help directly from an Oracle hosted server. The hosted online help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support, because that documentation is now incorporated into the hosted website content. The Hosted Online Help website is available in English only.

Note: Only the most current release of hosted online help is updated regularly. After a new release is posted, previous releases remain available but are no longer updated.

Locally Installed Help

If you are setting up an on-premises PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the Hosted Online Help website, you can install the PeopleSoft Online Help locally. If you install the help locally, you have more control over which documents users can access and you can include links to your organization's custom documentation on help pages.

In addition, if you locally install the PeopleSoft Online Help, you can use any search engine for full-text searching. Your installation documentation includes instructions about how to set up Elasticsearch for full-text searching. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help." If you do not use Elasticsearch, see the documentation for your chosen search engine.

Note: See Oracle Support Document 2205540.2 (PeopleTools Elasticsearch Home Page) for more information on using Elasticsearch with PeopleSoft.

Note: Before users can access the search engine on a locally installed help website, you must enable the Search field. For instructions, go to your locally installed PeopleSoft Online Help site and select About This Help >Managing Locally Installed PeopleSoft Online Help >Enabling the Search Button and Field in the Contents sidebar.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has

a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

• Application Fundamentals

• Using PeopleSoft Applications

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft Applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

Typographical Convention	*Description*
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For Alt+W, hold down the Alt key while you press the W key.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (	).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.

Typographical Convention	Description
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region and Industry Identifiers

Information that applies only to a specific region or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

• Asia Pacific

• Europe

• Latin America

• North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in the PeopleSoft Online Help:

- USF (U.S. Federal)

- E&G (Education and Government)

Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

Using and Managing the PeopleSoft Online Help

Click the Help link in the universal navigation header of any page in the PeopleSoft Online Help to see information on the following topics:

- What's new in the PeopleSoft Online Help.

- PeopleSoft Online Help accessibility.

- Accessing, navigating, and searching the PeopleSoft Online Help.

- Managing a locally installed PeopleSoft Online Help website.

Related Links for PeopleSoft HCM

PeopleSoft Information Portal

My Oracle Support

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

PeopleSoft Business Process Maps (Microsoft Visio format)

Contact Us

Send your suggestions to PSOFT-INFODEV_US@ORACLE.COM. Please include release numbers for the PeopleTools and applications that you are using.

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Chapter 1

Getting Started with Manage Employee Reviews

Manage Employee Reviews Business Process Overview

Manage Employee Reviews is a business process in PeopleSoft Human Resources (HR) and is a competency-based assessment tool with the ability to track individuals' goals and assess goals attainment. The primary purpose of the Manage Employee Reviews business process is to drive competency-based training, but it can also be used to drive competency-based rewards and compensation.

The Manage Employee Reviews business process comprises the following main phases of operation:

- Setting up supporting tables.

- Creating employee review documents.

- Managing employee review documents.

Setting Up the Supporting Tables

The following is a list of the basic setup tasks administrators complete before managers can create employee review documents:

1. Define rating models.

2. Define content items or competencies.

3. (Optional) (JPN) Define Japan review IDs.

4. Clone the Basic Employee Review Template, and update the new employee review template.

Creating Employee Review Documents

Managers can use these methods to create employee reviews:

- Create employee review documents for direct reports.

- Create employee review documents by group.

See Creating Employee Review Documents.

Managing Employee Review Documents

Managers, employees, and administrators perform these tasks to manage the employee review process:

- Managers update competencies and goals in the employee review document.

    Completing Manager Evaluation Documents

- The employee can update the competencies and goals contained in their self-evaluation document, and rate their own performance.

  Completing Employee Self-Evaluation Documents

- The manager records an evaluation of the employee against the goals and competencies contained in the review document.

  Completing Manager Evaluation Documents

- The manager or an administrator can transfer the employee review document to another manager.

  Transferring Employee Review Documents

- Administrators can print reports that list late or missing employee reviews.

  Processing Employee Review Reports

- The manager or an administrator can cancel an incorrectly created employee review document.

  Canceling Employee Review Documents

Manage Employee Reviews Business Processes

Manage Employee Reviews business process in PeopleSoft HR enables you to:

- Create employee review documents.

- Update and review goals and competencies for employees in review documents.

- Complete the employee's self evaluation.

- Transfer employee review documents to another manager.

- Monitor late and missing employee review documents.

- Cancel an incorrectly created employee review document.

- Review worker performance (history reviews).

We discuss these business processes in the business process topics in this product documentation.

Manage Employee Reviews Integrations

Manage Employee Reviews business process integrates with these PeopleSoft applications:

- PeopleSoft Profile Manager.

- PeopleSoft HR: Plan Salaries.

We discuss integration considerations in the implementation topics in this product documentation.

Manage Employee Reviews Business Process Implementation

Use the Excel to Component Interface utility in Profile Management with the Competencies component interface to populate the business process tables. This component interface helps you to load competencies into the Content Catalog used by Manage Employee Reviews business process.

See "Manage Profiles Implementation" (PeopleSoft HCM 9.2: Human Resources Manage Profiles).

This table lists the Employee Review component that has a component interface:

Component	Component Interface	References
EP_APPR_MAIN	CI_EP_APPR_MAIN	See Completing Manager Evaluation Documents.

Refer to the *PeopleSoft HCM 9.2 - Reorganization of Component Interface Permissions* (Doc ID 2342162.1) MOS posting for a list of system-delivered CIs and their usage, the mapping of CIs and associated permission lists, and the mapping of CI permission lists and user roles.

See *PeopleTools: Component Interfaces* and *PeopleTools: Setup Manager*

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources is available in Application Fundamentals.

Important! The order in which you set up the tables that are required to implement Manage Employee Reviews business process may vary. The order may depend on the features that you want to use and whether you are implementing more than one PeopleSoft application. The information provided in this topic offers a high-level overview of how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.

Chapter 2

Setting Up Employee Reviews

Assigning Roles and Permission Lists

This section lists roles and permission lists that are available to federal customers.

The following tables list the roles and associated permission lists that you can assign to users that allow them to use the employee review functionality.

- Employee Review Manager and Employee Review Employee roles enable the use of the self-service features.

- Employee Review Setup (USF) and Employee Review Administrator (USF) are roles that are specific to federal functionality.

Roles

Role	Permissions
Employee Review Setup (USF)	HCCPHR2070, HCCPHR2080
Employee Review Administrator (USF)	HCCPHR2060, HCCPHR2090, HCCPHR3250
Employee Review Manager	HCCPSS2145
Employee Review Employee	HCCPSS1340

Permission Lists

Permission List	Description
HCCPHR2060	Employee Review - Admin
HCCPHR2070	Employee Review - Setup
HCCHR2080	Employee Review - Setup USF
HCCPHR2090	Employee Review - Admin USF
HCCPHR3250	Employee Review - Reporting
HCCPSS2145	Employee Review - MGR
HCCPSS1340	Employee Review - EE

(USF) Updating the PERF-USF Document Type

To update the PERF-USF document type, use the Update Document Type (USF) (EP_REVIEW_TYPE_TBL) component.

This section provides an overview of the PERF-USF document type and discusses how to update the PERF-USF document type.

Page Used to Update the PERF-USF Document Types

Page Name	Definition Name	Usage
(USF) Update Document Type (USF) Page	EP_REVIEW_TYPE_USF	Update the PERF-USF document type.

Understanding the PERF-USF Document Type

The system delivers a federal document type called PERF-USF that tells the system where to look for the template when it generates performance documents for federal employees. By default, the system prompts managers to select the template when they create the review documents.

If you prefer to have the system determine which template to use by checking the job profile that is associated to the employee's job data, specify this on the Document Type page by adding a new effective-dated row to the table.

The system-delivered definition for the PERF-USF document type is dated 01/01/1900. According to this definition, the template source is user-specified, meaning that managers must select the template to use when they create the performance review documents.

You can modify the definition for the PERF-USF document type by inserting a new effective-dated row. You can then instruct the system to look at the job profile that is associated with the employee's job data (job code, job family, position, salary grade, department, location or business unit) to determine which template to use.

Note: A second document type, PIP-USF, is provided for performance improvement plans. This document type is associated with the delivered PIP-USF template. You cannot modify or view the PIP-USF document type.

(USF) Update Document Type (USF) Page

Use the Update Document Type (USF) page (EP_REVIEW_TYPE_USF) to update the PERF-USF document type.

Navigation

Set Up HCM > Product Related > Workforce Development > Employee Review > Update Document Type (USF) > Update Document Type (USF)

Image: Update Document Type (USF) page

This example illustrates the fields and controls on the Update Document Type (USF) page.

Document Type	Displays *PERF-USF*, which is the delivered document type for federal employee reviews. You cannot create or modify other document types.
Template Source	Identify where the system should look for the template when it generates employee review documents for federal employees. Values are: *User Specified:* Select this option to have the system make all templates available for selection when a performance document is generated. *Profile Management:* Select this option to have the system look at the job profile that is associated with the employee's job data (job code, job family, position, salary grade, department, location or business unit) to determine which template to use. When selected, the Profile Type becomes available for edit. See (USF) Working with Profiles.
Profile Type	Select the profile type to use to determine the template when you create documents. The system finds the template associated with the profile based on the employee's job data.
Default Template	This field is available if you select *Profile Management* in the Template Source field. Select the template to use to generate performance documents for this document type when no template is associated with the profile.

(JPN) Creating Review Identifiers

To create review identifiers, use the Define Review JPN (REV_DEF_TBL_JPN) component.

This section provides an overview of review identifiers (IDs) and discusses how to define review identifiers.

Page Used to Create Review Identifiers

Page Name	Definition Name	Usage
(JPN) Define Review JPN Page	REV_DEF_TBL_JPN	Define review identifiers.

Understanding Review Identifiers

Review IDs associate document types with setIDs. In some organizations, the document types and the performance periods that one business unit uses can differ from those in another business unit. You also define whether the performance results are considered by the Grade Advance Candidate JPN and by any of the salary increase processes of the Plan Salaries business process for Japan.

When you create a document template, you can designate that the documents generated from the template are used for official reviews. This is required if you want to use the Manage Base Compensation and Budgeting business process. Pages in this business process locate employee review results by locating the document ID that is linked to the template that was used to create the employee review document.

Related Links
"Template Definition - General Page" (PeopleSoft HCM 9.2: ePerformance)

(JPN) Define Review JPN Page

Use the Define Review JPN page (REV_DEF_TBL_JPN) to define review identifiers.

Navigation

Set Up HCM > Product Related >Workforce Development > Employee Review > Define Review (JPN) > Define Review JPN

Image: Define Review JPN page

This example illustrates the fields and controls on the Define Review JPN page.

Period Begin Date and **Period End Date**	Enter the first and last dates of the performance period. This information is informational only.
	See "Template Definition - General Page" (PeopleSoft HCM 9.2: ePerformance).
Document Type	Select the document type that is valid for the selected setID.
Include in Grade Advance	Select this check box to include this review when you run the JPN Grade Advance Candidate (PER062JP) SQR report.
	To run the JPN Grade Advance Candidate report, you define the criteria employees must meet before they are eligible for a grade advancement, including the number of eligibility points they must earn on evaluations. For example, you can have the system take an average or weighted average of the eligibility points for the employee's last three evaluations. When you run the Grade Advance Candidate process, the system looks at the number of eligibility points the employee earned on this and other designated or applicable evaluations. If the eligibility points meet the required threshold, the employee is eligible for a grade advancement.
	This field works with the eligibility points that are defined for the rating model that the system references when calculating the performance results (the Overall Summary section of the document).

Related Links

"(JPN) Setting Grade Advance Criteria" (PeopleSoft HCM 9.2: Human Resources Manage Base Compensation and Budgeting)

Creating Templates

To create template, use the Clone Review Template (EP_CLONE_TMPL) and the Define Empl Review Template (EP_TMPL_BASIC) components.

This section provides an overview of employee review templates, performance ratings, and discusses how to create templates.

Pages Used to Create Templates

Page Name	*Definition Name*	*Usage*
Clone Employee Review Template Page	EP_CLONE_TMPL	Create a new employee review template.
Define Empl Review Template - General Page	EP_TMPL_BASIC1	Describe and activate an employee review template.

Page Name	Definition Name	Usage
Define Empl Review Template - Structure/Content Page	EP_TMPL_BASIC2	Define the rating model, calculation method, competencies, and goals, and the weight of the competencies for the employee review template.

Understanding the BASIC Template

Templates are the foundation for employee review documents. PeopleSoft delivers the *BASIC* template for the Manage Employee Reviews business process. The BASIC template has sections linked to it that are used to define the structure of an employee review document. These sections are:

- Competency

- Goals

- Overall Summary

The BASIC template cannot be modified. To create a template to match your organizations need, you must clone the basic template and then modify the newly created template. New templates can contain one or more of the linked sections.

Competency

The Competency section enables users to evaluate an employee's performance for specific items. Items can be added manually or from the Content Catalog.

Goals

The Goals section enables users to add employee goals to the review document. Goals are not assigned to the template, but are added to the review document after it is created.

Overall Summary

The Overall Summary section identifies the employee's overall performance ratings. The system converts the ratings from the Competency sections into an overall summary rating.

(USF) Understanding Templates

Employee review templates are the foundation for employee review documents. PeopleSoft provides two templates for federal use:

- Performance Plan (PERF-USF).

- Performance Improvement Plan (PIP-USF).

These templates cannot be modified. To create a template to match your organizations need, you must clone the template and then modify the newly created template.

Performance Plan Template (PERF-USF)

This template is designed for employee performance reviews. It contains four sections:

- Performance Elements

  The Performance Elements section enables you enter free-form performance criteria against which you want to evaluate the employee's performance.

- Goals

  The Goals section enables users to add employee goals to the review document. Goals are not assigned to the template, but are added to the review document after it is created.

- Overall Summary

  The Overall Summary section identifies the employee's overall performance ratings. The system converts the ratings from the Competency sections into an overall summary rating.

- Signature

  When the document is printed, this section provides an area for employee and manager signatures.

Performance Improvement Plan (PIP-USF)

This template is designed to address issues that have adversely impacted the employee's performance review. It contains two sections:

- Performance Improvement Plan.

  This section is used to assess performance improvements and assign a status.

- Signature Section.

  When the document is printed, this section provides an area for employee and manager signatures.

Understanding Performance Ratings

Two sections enable you to assign ratings that measure the employee's performance. These sections use rating models and calculation methods to determine the employee's rating.

These sections are:

- Competency

- Overall Summary

Note: This topic does not apply to the USF Employee Review process. It supports only the average calculation rating.

Competency

The competency section enables you to select from two calculation methods:

- Average

  This calculation method uses the numeric ratings that corresponds to the qualitative ratings (defined on the rating model) to calculate a weighted average, if weightings exist; otherwise, it calculates

a straight average. It then converts this average back to a qualitative rating, again using the rating model.

To use this calculation method, rating models that are associated with the competencies section and its individual competencies must have defined numeric ratings.

Note: Weights are used when the calculation method is *Average.* Weighting a competency enables you to place more or less significance on a particular competency relative to the other competencies in the review.

- Summation

  This calculation method converts qualitative ratings to review points (defined in the rating model), calculates the total review points, and refers to the point range that is defined on the competency section's rating model to convert this total into the corresponding review rating for the competency section. Weightings are ignored.

  To use this calculation method, rating models that are associated with the competencies and the competency section and must define review points. The rating model for the competency section must also define point ranges in the From Points and To Points fields.

Note: PeopleSoft recommends using the Average method over the Summation method. Its easier to understand, set up, and maintain, and you can achieve the same results by using weighted averages.

Overall Summary

The Overall Summary section identifies the employee's overall performance rating. The system converts the rating from the Competencies section into an overall summary rating by using the calculation method and rating model that are specified for the Overall Summary section.

PeopleSoft provides three calculation methods for calculating an overall summary rating:

- Average

  Same as above.

- Summation

  Same as above.

- Review Band

  This calculation method is similar to Summation, and is unique to the Overall Summary section of a review document.

  To use this method, the rating model that is associated with the overall summary section must have Review Band selected and define review points as well as point ranges in the From Points and To Points fields.

  During the calculation process, the system computes the total review points for the Overall Summary section and converts this total into the equivalent review band on the employee review.

Because the Competency and Overall Summary sections can have different calculation methods, the calculation method that you select for the overall rating (the Overall Summary section) determines which calculation method the Competency section can use. This table lists the allowed calculation methods:

Calculation Methods Allowed in Overall Summary Section	Calculation Methods Allowed in Competency Section
Average	Average
Summation	Average*, Summation (see note)
Review Band	Average*, Summation (see note)

Steps for Creating Templates

To create templates that can be used to generate performance-related documents, use the following steps:

1. Clone an existing template using the Clone Template Definition page.

   At least one template must be cloned from the BASIC template before you can begin the employee review process. The BASIC template cannot be modified and is used strictly for cloning purposes.

   PeopleSoft recommends that you limit the number of templates that you create for each document type. This makes it easier for users to select the correct template when they generate review documents, and it simplifies template maintenance.

2. Define general information for the newly created template using the Define Empl Review Template – General page.

   Use the general information section to identify the document type for the template. Document types help organize employee review documents. You can use them to narrow the focus when printing late or missing employee review reports or to limit the search criteria when looking up employee reviews. PeopleSoft provides five document types:

   - Performance/Salary Evaluation

   - Performance Document

   - Salary Planning

   - (USF) Performance Plan

   - (USF) Performance Improvement Plan

   Also identify where the documents that are generated from this template are official. If a document is identified as being official, the Salary Planning by Group business process and the Salary Increase Matrix function in PeopleSoft HR Results uses the results. If an employee has more than one official document, these processes use the results of the document with the latest period end date.

   For Japan, the review ID is identified and is used by the JPN salary increase processes in Plan Salaries. In some organizations, the types of reviews that are given and the review periods in one business unit may differ from the types of reviews that are given and the review period in another business unit. You use review IDs to identify which document types are valid for a particular setID. You also define whether the performance results are to be considered by the Grade Advance Eligibility feature of the Plan Salaries business process. The Plan Salaries business process recognizes employee review results by the review ID that is linked to the template that is used to create the employee review document.

3. Define the content and structure for the newly created template using the Define Empl Review Template - Structure/Content page.

    Select rating models, define performance criteria, weight the items, and indicate if they are critical.

Prerequisites

Before you create templates, set up the rating table.

See "Defining Rating Models" (PeopleSoft HCM 9.2: Human Resources Manage Profiles).

Clone Employee Review Template Page

Use the Clone Employee Review Template page (EP_CLONE_TMPL) to create a new employee review template.

Navigation

Set Up HCM > Product Related > Workforce Development > Employee Review > Clone Employee Review Template > Clone Employee Review Template

Image: Clone Employee Review Template page

This example illustrates the fields and controls on the Clone Employee Review Template page.

New Document Type	Select the document type that you want to copy into the new employee review template.
New Template ID	Enter the ID for the new template.

Define Empl Review Template - General Page

Use the Define Empl Review Template - General page (EP_TMPL_BASIC1) to describe and activate an employee review template.

Navigation

Set Up HCM > Product Related > Workforce Development > Employee Review > Define Empl Review Template > Define Empl Review Template - General

Image: Define Empl Review Template - General page

This example illustrates the fields and controls on the Define Empl Review Template - General page.

Official Review	Select to designate that review documents generated for this document type are official. You can designate any number of templates as official.
	For commercial users, selecting this check box enables the Salary Planning by Group process to retrieve rating and review points for review documents that are created from this template. It also enables the Salary Increase Matrix function to retrieve the rating.
	For federal users, this check box is selected by default on the PERF-USF template. It enables salary increases to be tied to employee performance reviews, and the Within-Grade Increase (WGI) process to pick up completed performance reviews.
	If an employee has more than one official review document, these processes use the results of the review document with the latest period end date.
(JPN) Review ID	Select an ID to enable the Salary Planning business process by review ID. You define IDs on the JPN Review Definition Table page. The prompt table displays only those review documents that are defined for the selected document type.
(JPN) Include in Grade Advance	Select to indicate whether the selected review ID is eligible for the Grade Advance feature of the Plan Salaries business process. It is set up on the JPN Review Definition Table page.

Define Empl Review Template - Structure/Content Page

Use the Define Empl Review Template - Structure/Content page (EP_TMPL_BASIC2) to define the rating model, calculation method, competencies, and goals, and the weight of the competencies for the employee review template.

Navigation

Image: Define Empl Review Template - Structure/Content page

This example illustrates the fields and controls on the Define Empl Review Template - Structure/Content page.

Sections

Rating Model	Select a value to use to rate an employee's performance or proficiency when calculating the rating for the competencies section across the employee's individual competencies.
	See "Defining Content Items" (PeopleSoft HCM 9.2: Human Resources Manage Profiles).
Calculation Method	Select the method for calculating the section rating. Options are *Summation* and *Average*.
	Note: If this is an Overall Summary section, the calculation method that you select here determines which calculation methods are valid for the other sections.
	See Understanding the BASIC Template.

Section Items

Item ID   This field is available for Competency sections only.

                                           Select an item or competency by which you want evaluated in
                                           every review document created from this template.

Title   For Performance Element sections, enter text that describes the
                                           performance criteria you want to evaluate.

                                           For Competency sections, this field displays the title associated
                                           with the item selected in the Item ID field.

Weight   Enter the weight of this competency relative to all other
                                           competencies. Use only when *Average* is selected as the
                                           calculation method. Leave the field blank if all competencies are
                                           to be weighted equally.

(USF) Critical   Select this check box if you want to indicate that this criteria is
                                           critical. This is for used for informational purposes only.

Sub-Items

Define any performance criteria or sub-items for the element.

(USF) Working with Profiles

This section provides an overview of working with job profiles.

Understanding How Profiles Work with Manage Employee Review

The employee review process has the capability to use profiles to find the appropriate template associated
with an employee's job data.

To use profiles in Manage Employee Review:

1. Create a new non-person profile type or use an existing non-person profile type. The profile type
   must have at least one of the following profile identity options defined: job code, job family, position,
   salary grade, department, location or business unit.

2. Create the profiles and associate the profiles to the job data.

Creating Job Profiles

To set up a job profile:

1. Create a profile ID and enter a description of the profile.

2. Use the profile identities section to select the profile identity option (job code, job family, position,
   salary grade, department, location or business unit) then select the appropriate identities (such as job
   code 11000 — Accountant) for the profile.

3. Use the profile association section to select the profile association option of performance template then enter the document type (PERF-USF) and the template to be used for this profile

Associating Job Profiles with Employees

When (USF) Employee Review documents are created and Profile Management is selected as the template source on the PERF-USF document type, the system locates the appropriate template based upon the employee's job data. If Profile Management is selected, the system:

1. Identifies the profile type entered in the Profile Type field on the Update Document Type (USF) page for the PERF-USF document type.

2. Retrieves the employee job data record.

3. Identifies all Profile IDs associated with the profile type.

4. Identifies all the profile identity options and keys associated with the Profile IDs.

5. Orders those profile identity options according to the sequence defined on the Profile Identity Options — Configuration page.

6. Uses the first profile identity option in the sequenced list and finds the appropriate employee job data.

7. Finds the profile that is associated to the job data.

8. Selects the template associated with the profile based upon the document type that is being used to create the documents. If the system can find a profile that matches the employee data then the system uses the next profile identity option in the sequenced list. If the system is unable to locate a profile associated to the employee job data or a template on the profile, the system will use the default template indicated on the document type to create the document.

•   Job Code Profile

•   Job Family

•   Position Data

•   Salary Grade Table

Chapter 3

Managing Employee Reviews

Creating Employee Review Documents

This section discusses how to create employee review documents.

Note: The process for creating employee reviews, whether it is by direct reports or group IDs, is similar. Creating employee reviews by group has one extra step at the beginning. The manager or HR administrator first selects the group ID for which employee reviews are to be created and then continues with the process.

Pages Used to Create Employee Review Documents

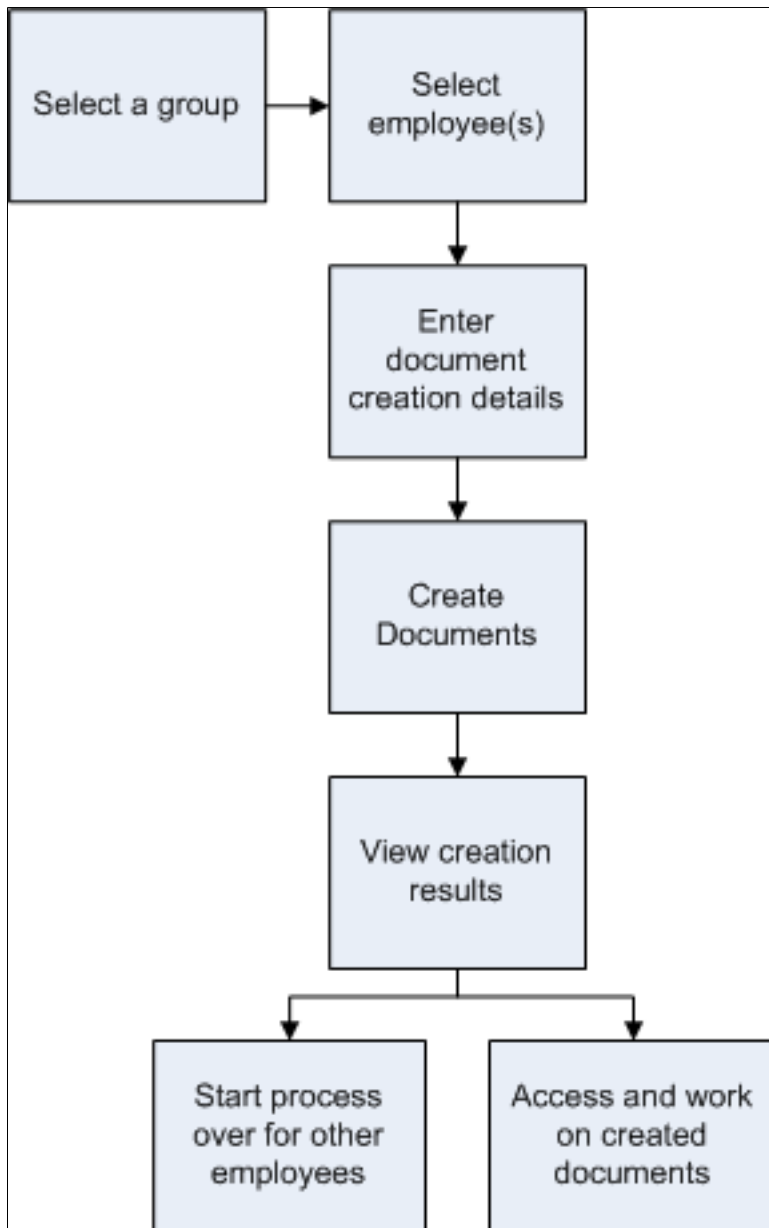| Page Name	Definition Name	Usage
Create Performance Documents - Select Group Page	HR_DR_DIRECTREPORT	Select a group of employees for whom you want to create documents.
Create Performance Documents - Employee Selection Criteria Page	HR_DR_DIRECTREPORT	Select individual employees for whom documents are created.
Create Performance Documents - Document Creation Details Page	EP_CREATEAPPR_MGR	Select the document template and dates that you want to use to create documents.
Create Performance Documents - Results Page	EP_CREATE_RESULTS	View the document creation results for the employees or group that you selected.

Understanding the Create Employee Review Document Process

Creating employee reviews is a simple process. The manager selects the employees for which they want to create review documents and enters the review period, document type, and template. The system creates the documents based on the selection criteria. Then, the manager and the employees can access the documents to add the ratings and comments.

This diagram outlines the self-service process flow:

Image: Self-service process flow

Process flow for creating employee review documents.

Create Performance Documents - Select Group Page

Use the Create Performance Documents - Select Group page (HR_DR_DIRECTREPORT) to select a group of employees for whom you want to create documents.

Image: Create Performance Documents - Select Group page

This example illustrates the fields and controls on the Create Performance Documents - Select Group page.

Select the group for which you are creating documents. The system takes you to the next page where you can select one or more employees from the selected group for whom documents are created.

Create Performance Documents - Employee Selection Criteria Page

Use the Create Performance Documents - Employee Selection Criteria page (HR_DR_DIRECTREPORT) to select individual employees for whom documents are created.

Navigation

- Manager Self-Service >Performance Management >Performance Documents >Create Documents >Create Performance Documents

- Select a group on the Create Performance Documents - Select Group page.

Image: Create Performance Documents - Employee Selection Criteria page

This example illustrates the fields and controls on the Create Performance Documents - Employee Selection Criteria page.

Select the employees (your direct reports or from a selected group that you manage) that you want to use for creating new performance documents. When you are done, click the Continue button.

Create Performance Documents - Document Creation Details Page

Use the Create Performance Documents - Document Creation Details page (EP_CREATEAPPR_MGR) to select the document template and dates that you want to use to create documents.

Navigation

Select one or more employees and click the Continue button on the Create Performance Documents - Employee Selection Criteria page.

Image: Create Performance Documents - Employee Selection Criteria page

This example illustrates the fields and controls on the Create Performance Documents - Document Creation Details page.

Period Begin Date and Period End Date	Enter the dates that the review period begins and ends. The review period is the segment of time for which you are reviewing the employee.
Document Type	Select the document type you want to associate with this group of employee review documents.
Template	Select the template that should be used to generate the review documents.

> **Note:** For (USF) Federal employees, this field is available only when the Template Source field on the Update Document Type page is set to *User Specified*. If Template is not available, the system uses the Template associated with the Employee's non-person profile.

See "Understanding Profile Management" (PeopleSoft HCM 9.2: Human Resources Manage Profiles).

Create Documents	Click to create review documents for the selected employees and to access the Create Performance Documents - Results page.

Create Performance Documents - Results Page

Use the Create Performance Documents - Results page (EP_CREATE_RESULTS) to view the document creation results for the employees or group that you selected.

Image: Create Performance Documents-Results page

This example illustrates the fields and controls on the Create Performance Documents-Results page.
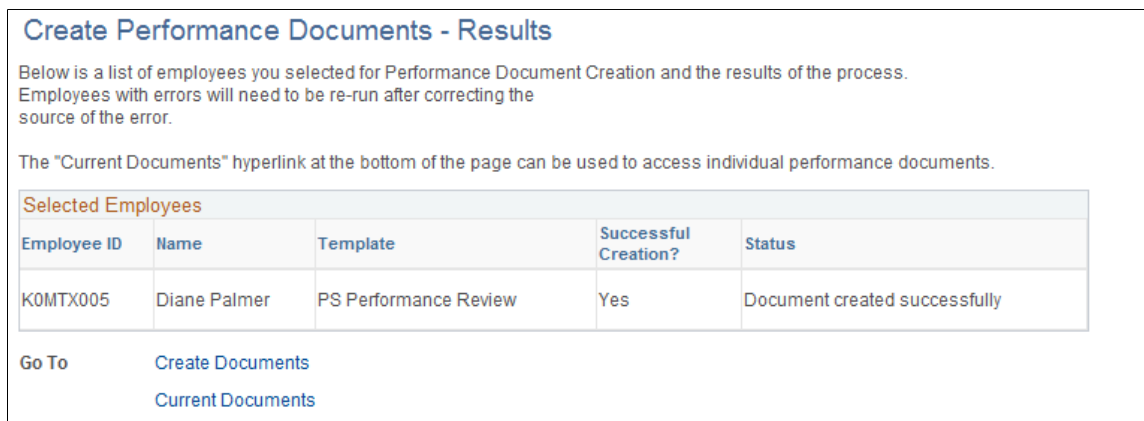
| **Successful Creation?** | Displays *Yes* if the system successfully created a document for the employee.

Displays *No* if the system did not create a document for the employee and the Statuscolumn displays an error message. You must correct the source of the error and rerun the process. |

| **Create Documents** | Click to access the Create Performance Documents - Employee Selection Criteria page and create documents for other employees. |

| **Current Documents** | Click to access the Current Performance Documents page to review or select current individual performance documents. |

Related Links

"Generating Documents as a Manager" (PeopleSoft HCM 9.2: ePerformance)

Completing Manager Evaluation Documents

To complete employee reviews, use the Performance Document (EP_APPR_MAIN) component. Use the CI_EP_APPR_MAIN component interface to load data into the tables for this component

This section discusses how to complete manager evaluation documents.

Pages Used to Complete Manager Evaluation Documents

Page Name	*Definition Name*	*Usage*
Current Performance Documents Page	EP_APPR_SELECT	Select the employee review document from which you want to update or view.

Page Name	Definition Name	Usage
Manager Evaluation Page (Manage Employee Reviews)	EP_APPR_MAIN1	Enter manager ratings and comments in each section (if applicable) of the employee's review document.

Current Performance Documents Page

Use the Current Performance Documents page (EP_APPR_SELECT) to select the employee review document from which you want to update or view.

Navigation

Manager Self Service > Performance Management > Performance Documents > Current Documents > Current Performance Documents

Image: Current Performance Documents page

This example illustrates the fields and controls on the Current Performance Documents page.

Filter Criteria

Use this section to refine the list of employee documents that are available in the Performance Documents section.

Performance Documents

This section lists the current performance documents for which you are the manager.

Employee   Click to open the review document of the selected employee in WorkCenter and update the manager evaluation.

Manager Evaluation Page (Manage Employee Reviews)

Use the Manager Evaluation page (EP_APPR_MAIN1) to enter manager ratings and comments in each section (if applicable) of the employee's review document.

Navigation

Click the employee link on the Current Performance Documents page.

Image: Manager Evaluation page (1 of 2) (manage employee reviews business process)

This example illustrates the fields and controls on the Manager Evaluation page (1 of 2) (manage employee reviews business process).
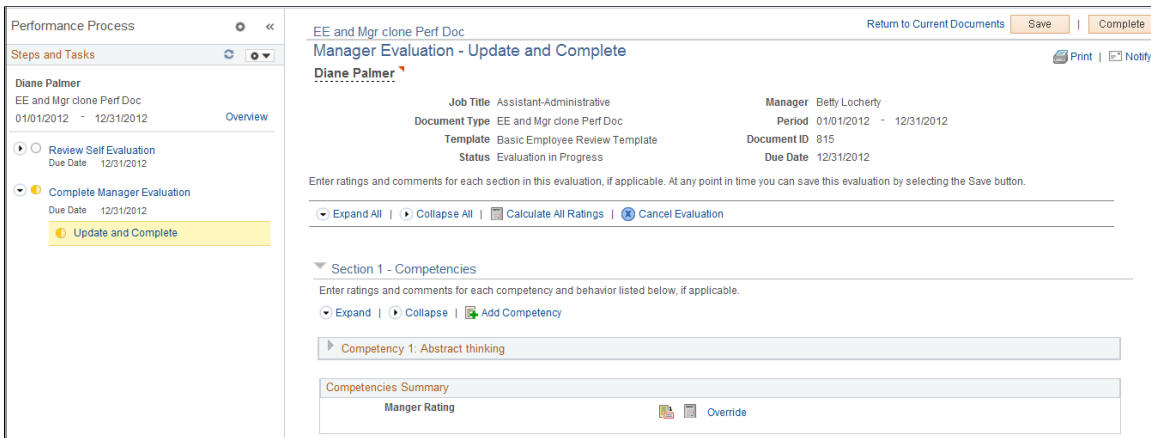
Image: Manager Evaluation page (2 of 2) (manage employee reviews business process)

This example illustrates the fields and controls on the Manager Evaluation page (2 of 2) (manage employee reviews business process).
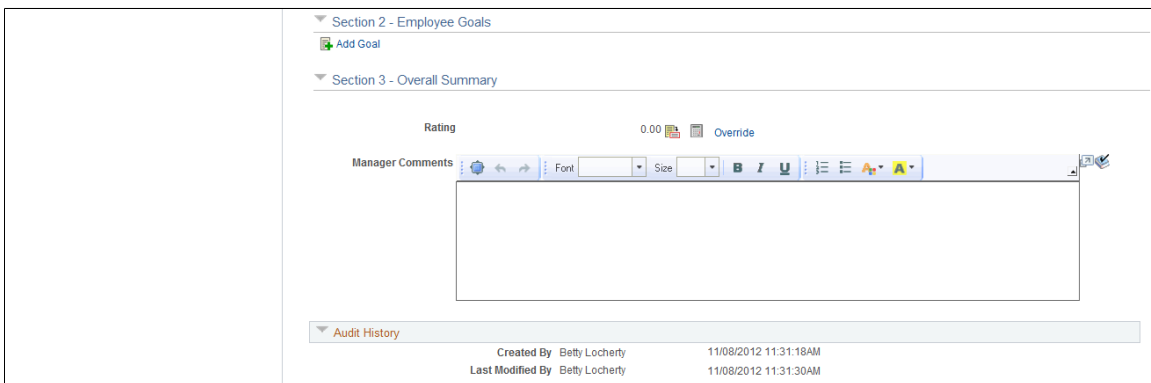
Note: The number of sections that a review document has depends on the template that was used to create the document. The screenshot displays a review document that was created using a cloned BASIC document template. The BASIC template contains three sections: *Competencies*, *Employee Goals*, and *Overall Summary*.

Display of Review Documents in WorkCenter

To help users gain better insight into the review process and provide them with quick and easy access to information without having to leave the current documents that they are working on, both ePerformance

and the Manage Employee Reviews business process leverage the WorkCenter framework functionality and present review documents in a guided, status-driven manner. The pagelet on the left shows where the user currently is in the process and which steps and tasks have been or yet to be attempted along with status; the transaction page on the right corresponds to the current step that the user is on and it is where user actions take place.

For more information on the use of WorkCenter in employee reviews, see "Understanding ePerformance WorkCenter" (PeopleSoft HCM 9.2: ePerformance).

Header Actions

Related Actions for <employee name>

Click the Related Actions for <employee name> icon to expand the list of related actions that are available to the employee. Related actions provide users quick access to major self service transactions from one page instead of through traditional menu navigations.

Return to Current documents

Click to return to the Current Performance Documents page without saving any changes.

Save

Click to save the document.

Expand All

Click to expand all sections in this document.

Complete

Click to mark the manager evaluation as complete.

Collapse All

Click to collapse all sections in this document.

Calculate All Ratings

Click the Calculate All Ratings icon to calculate the Competencies and Overall Summary section ratings. Ratings are not calculated for sections or summaries that have been overridden.

Note: (USF) When you click Calculate All Ratings, Save, or Complete, the system displays a warning if the numeric rating in the Overall Summary section is 0.6 higher or lower than the numeric element ratings.

Cancel Evaluation

Click the Cancel Evaluation icon to terminate and discard the entire employee evaluation.

Section 1 - Competencies

Add Competency

Click to add a new competency to the evaluation.

Manager Rating

Select a qualitative rating for this competency from the list of available options. The values appearing in the list come from the rating model associated with this competency on the Competency table. If you need guidance to decide which rating to select for the employee, click the Rating Description button to view the description of each rating.

Weight

Enter a weight here to assign different relative weights to competencies. Enter the weight as a percentage, for example

enter 40 to indicate that this competency accounts for 40% of the summary rating across all competencies. If used, all weights must add up to 100.

Manager Comments   Enter comments in the rich text editor regarding the employee's proficiency level, in support of the rating you've assigned.

🗑️ **Delete Competency**   Click the Delete Competency icon to remove an exiting competency.

Competencies Summary   Click the Calculate Rating button to have the system calculate the rating for the Competencies section, or select an override rating.

Section 2 - Employee Goals

Add Goal   Click to add a new goal to the evaluation.

Delete Goal   Click to remove an existing goal.

Edit Details   Click to edit specific details of the employee goal.

Section 3 - Overall Summary

Use this section to enter the overall comment for the employee based on all the assessed areas. Similar to the Competencies section, you can click the Calculate Rating button to have the system calculate the rating for this section, or select an override rating.

Completing Employee Self-Evaluation Documents

This section lists the pages used to complete employee self-evaluation documents.

The process that employees follow to complete their self-evaluation documents is similar to the process managers follow to complete their evaluation of their direct reports. For more information about manager evaluations, see Completing Manager Evaluation Documents.

Pages Used to Complete Employee Self-Evaluation Documents

Page Name	Definition Name	Usage
Current Performance Documents Page	EP_APPR_SELECT	Select the document that you want to work on. See "Current <Performance or Development> Documents Page or <Performance or Development> Documents Page" (PeopleSoft HCM 9.2: ePerformance)

Page Name	Definition Name	Usage
Self Evaluation Page	EP_APPR_MAIN1	Add or update competencies and goals to the employee self-evaluation. See "<Manager or Self-> Evaluation Page" (PeopleSoft HCM 9.2: ePerformance)

(USF) Recording Reviewer Comments

This section discusses how to record reviewer comments.

Pages Used to Record Reviewer Comments

Page Name	Definition Name	Usage
Maintain Reviewer Comments USF Page	EP_APPR_SELECT	Select the employee review document to which you want to add comments.
Reviewer Comments USF Page	GVT_EP_COMMENTS	Enter comments about an employee's performance from multiple reviewers.

Understanding Reviewer Comments

Managers can add comments about an employee's performance that are received from the employee's peers, subordinates, customers, or other reviewers.

Reviewer Comments USF Page

Use the Reviewer Comments USF page (GVT_EP_COMMENTS) to enter comments about an employee's performance from multiple reviewers.

Navigation

Click the employee name link on the Maintain Reviewer Comments - USF page.

Reviewer Comments

Reviewer ID   Select or enter the identification number of the reviewer.

Reviewer Role   Select the role that best describes the relationship between the reviewer and the employee being reviewed.

Transferring Employee Review Documents

This section lists the pages used to transfer an employee review document to another manager.

For more information about transferring documents, see "Understanding Administrative Tasks" (PeopleSoft HCM 9.2: ePerformance) and "Transfer Document Page" (PeopleSoft HCM 9.2: ePerformance).

Pages Used to Transfer Employee Review Document

Page Name	Definition Name	Usage
"Transfer Document Page" (PeopleSoft HCM 9.2: ePerformance)	EP_APPR_SELECT	Select documents for transfer from one manager to another.
"Confirm Transfer Page" (PeopleSoft HCM 9.2: ePerformance)	EP_APPR_XFER	Confirm the transfer of documents between managers.

Canceling Employee Review Documents

This section lists the pages used to cancel employees' review documents.

For more information about canceling documents, see "Understanding Administrative Tasks" (PeopleSoft HCM 9.2: ePerformance) and "Cancel Document Page" (PeopleSoft HCM 9.2: ePerformance).

Pages Used to Cancel Employee Review Documents

Page Name	Definition Name	Usage
"Cancel Document Page" (PeopleSoft HCM 9.2: ePerformance)	EP_APPR_SELECT	Cancel employee review documents.
Confirm Cancellation Page	EP_APPR_CANCEL	Confirm the cancellation of employee review documents.

Understanding Canceling Employee Review Documents

Managers and Employee Review Administrators (Employee Review Admin USF) can cancel an employee review document. Managers can only cancel documents with a document status of *Define Criteria, Track Progress,* and *Evaluation in Progress*. Employee Review Administrators can cancel any document that is not already canceled. After you cancel a document, it becomes inactive. Canceling a document does not remove it from the system — it only marks it as canceled and the document appears in the Historical Documents page instead of Current Documents. If a document is canceled the system removes the competency evaluations that were sent to the Person's Profile in Profile Management when the document was originally completed

Viewing Employee Review Documents

This section lists the pages used view employees' review document.

For more information about the View Performance Documents page, see "Viewing Documents for Your Team" (PeopleSoft HCM 9.2: ePerformance).

Pages Used to View Employee Review Document

Page Name	Definition Name	Usage
View-Only Documents Page	HR_DR_DIRECTREPORT	Select an employee for whom the review document is to be viewed. See "Viewing Documents for Your Team" (PeopleSoft HCM 9.2: ePerformance)
View Performance Documents Page	EP_APPR_SELECT	Select a document to review. See "Viewing Documents for Your Team" (PeopleSoft HCM 9.2: ePerformance)

Processing Employee Review Reports

This section discusses how to process employee review reports.

Pages Used to Process Employee Review Reports

Page Name	Definition Name	Usage
Late Documents Page	RUNCTL_EP_RPT	Generate a list of late review documents, by document type, for a group of employees. The system considers a review document to be late if the review's due date (review period end date) is less than, or equal to the current date.
Missing Documents Page	RUNCTL_EP_RPT	Generate a list of missing employee review documents for a group of employees (group ID) and a given document type and date range. If an active employee has no review document with review period begin/end dates that would cause any part of the review period to fall within the date parameters specified for the report.

Late Documents Page

Use the Late Documents page (RUNCTL_EP_RPT) to generate a list of late review documents, by document type, for a group of employees.
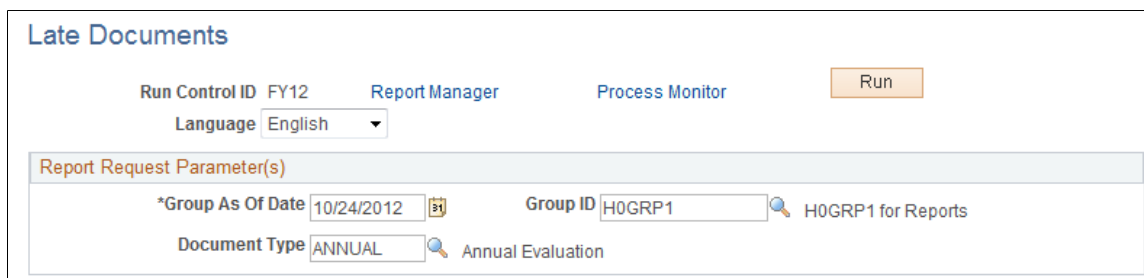
The system considers a review document to be late if the review's due date (review period end date) is less than, or equal to the current date.

Navigation

Workforce Development > Performance Management > Reports > Late Documents Report > Late Documents

Image: Late Documents page

This example illustrates the fields and controls on the Late Documents page.

Language	Select the language in which you want to generate the report.
Group As Of Date	Select the as of date. The report generates a list of late documents for employees belonging to the group that is defined in the Group ID field as of the date specified.
Group ID	Enter the group ID of the employees for whom you want to generate the report.
Document Type	Select a document type, such as quarterly, annual, or project review. You define document types on the Document Types page.

Missing Documents Page

Use the Missing Documents page (RUNCTL_EP_RPT) to generate a list of missing employee review documents for a group of employees (group ID) and a given document type and date range.

If an active employee has no review document with review period begin/end dates that would cause any part of the review period to fall within the date parameters specified for the report.

Navigation

Workforce Development > Performance Management > Reports > Missing Documents Report > Missing Documents

Image: Missing Documents page

This example illustrates the fields and controls on the Missing Documents page.

Group As Of Date	Enter a group as of date.
	The report generates a list of missing documents for employees belonging to the group that is defined in the Group ID field as of the date specified.
Group ID	Identify the group of employees to include in the report.
Document Type	Select a document type, such as quarterly, annual, or yearly. You define document types on the Document Types page.
From Date and To Date	The from and to dates establish a date range that the system uses in conjunction with the period basis to select documents to include in the report. For example, if you define a from and to date range of January 1, 2011 to December 31, 2011, and the period basis is *Period End Date,* the report only selects documents whose period end date falls between those dates.
Period Basis	The period basis determines which of the dates on the manager evaluation the system uses when selecting missing documents to publish in the report. Options are:

- Period Begin Date

   Select this option to look for employees who do not have a document of the specified type with a period begin date falling within the range that you entered in the From Date and To Date fields.

- Period End Date

   Select this option to look for employees who do not have a document of the specified type with a period end date falling within the range entered in the From Date and To Date fields.

- Due Date

Select this option to look for employees who do not have a document of the specified type with a due date falling within the range entered in the From Date and To Date fields.

Chapter 4

Reviewing Worker Performance History

Common Elements Used to View Worker Performance History

Rating Model   A set of codes representing the levels of performance that you assign when evaluating worker performance. The following is an example of a rating model:

- 1 - Excellent

- 2 - Good

- 3 - Needs Improvement

- 4 - Unacceptable

    Set up more than one rating model if appropriate for evaluating different categories of workers.

Rating Scale   Also known as the Review Rating Scale, it provides a means of quantifying the overall results of a worker's review. The rating scale combines a list of competencies with a rating model and a method of calculating the worker's performance in each competency. The calculation method depends upon whether you are setting up an Average, Summation, or Review Band rating scale type.

Scale Type   The rating scale type determines the method of calculating a worker's performance in the competencies that you include in the rating scale. The system provides the following three rating scale types: Average, Summation, and Review Band.

Viewing Worker Review Information

This section discusses how to access worker reviews.

Note: Worker reviews are conducted in the Manage Employee Reviews business process.
Use the Employee Review pages to review detailed, historical information about salary reviews, performance reviews, or both.

Pages Used to Access Worker Reviews

| Page Name	Definition Name	Usage
Employee Review Page	EMPLOYEE_REVIEW_1	View worker reviews.
Reviewers Page	EMPLOYEE_REVIEW_2	Review the list of competencies included in the rating scale and appropriate review fields.
Reviewer Comments Page	EMP_RVW_RATING_SEC	Review comments about an individual competency.
Review History - Comments Page	EMPLOYEE_REVIEW_3	Review comments about the overall review. The same reviewer can record comments related to reviews for different evaluation types.
Goals Page	EMPLOYEE_REVIEW_4	Review worker goals and objectives.

Employee Review Page

Use the Employee Review page (EMPLOYEE_REVIEW_1) to view worker reviews.

Navigation

Workforce Development > Employee Review History > Review History > Employee Review

Image: Employee Review page

This example illustrates the fields and controls on the Employee Review page.
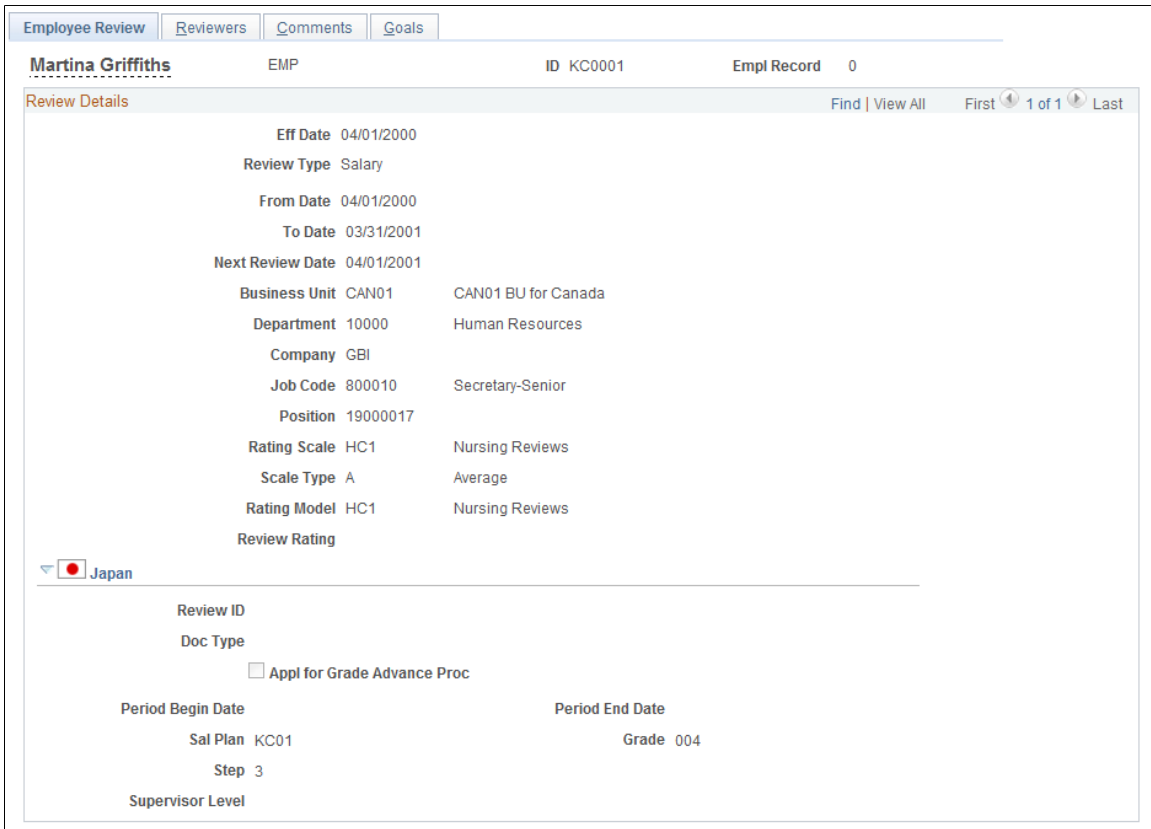
Review Details

Review Type   Displays one of these values:

- *Both* (both a Salary and a Performance review)

- *Empl Fdbc* (employee feedback)

- *Initl Rtng* (initial rating)

- *Intrm Rtng* (interim rating)

- *Offcl Rtng* (official rating)

- *Performance*

- *Salary*

- *Self Assmt* (self assessment)

Total Review Points   The system displays the total review points from the Reviewers page if the rating scale type is *Summation*.

Total Review Amount, Total Review Percent, or **Total Review Salary Points**	Depending on the resolution of the rating scale rating points, the system calculates and displays one of these fields as the result of the review if the rating scale type is Summation.
Status	Displays the status of this review.
Loaded to Job	Selected if you loaded the changes to the Job record.

Viewing Fields on the Employee Review Page

Different fields appear in this section of the page, depending upon the rating scale type. The following table lists the visible fields for each rating scale type.

Average	*Summation*	*Review Band*
Rating Scale	Rating Scale	Rating Scale
Scale Type	Scale Type	Scale Type
Rating Model	Rating Model	Rating Model
Review Rating	Total Review Points	Resulting Review Band
NA	Total Review Amount	Final Review Band
NA	Total Review Salary Points	Status
NA	Total Review Percent	Loaded to Job
NA	Status	NA
NA	Loaded to Job	NA

Reviewers Page

Use the Reviewers page (EMPLOYEE_REVIEW_2) to review the list of competencies included in the rating scale and appropriate review fields.
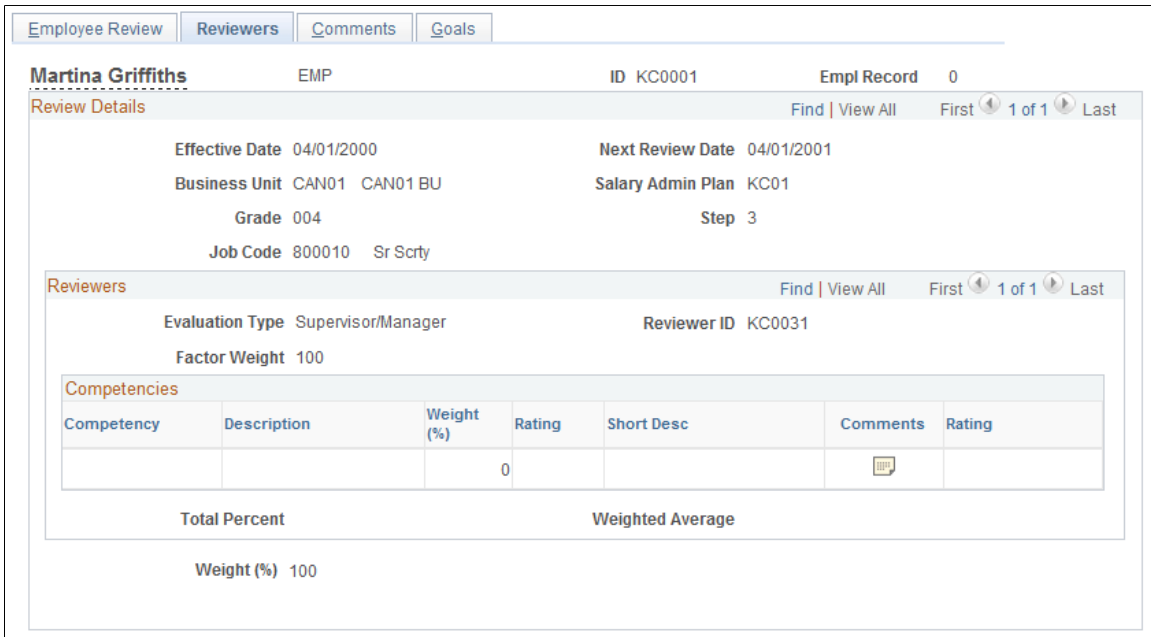
Navigation

Workforce Development > Employee Review History > Review History > Reviewers

Image: Reviewers page

This example illustrates the fields and controls on the Reviewers page.

Note: Column order for grids may vary by implementation. All columns may not be visible.

Review Details

Salary Admin Plan, Grade and **Step**   The system displays the worker's salary plan, grade, and step.

Reviewers

Factor Weight   Displays the weighting percent for this reviewer. The total weight of all reviewers for a review date must be 100 percent.

Competencies

The following table lists the fields that are visible for each of the rating scale types:

Average	Summation	Review Band
Competency	Competency	Competency
Weight (%)	Rating	Rating
Rating	Points	Points
Total Percent	Total Review Points	Total Review Points
Weighted Average	NA	NA

Competencies Field Definitions

Competency
Displays the competencies that you defined for the rating scale on the Rating Scale table.

Description
Displays the short description of the competency.

Weight (%)
(For Average scale only.)

The system displays the weight percent. The total of weight percents equals 100 percent for the worker.

Rating
Displays the review rating that you want to give the worker for this competency.

Points
(For Summation and Review Band scales only.)

Displays the points for this competency.

Comments
Click the Comments icon to access the Reviewers Comments page, where you can view comments about the review rating for this competency.

Total Percent
(For Average scale type only.)

The system enters the total of the competency weights.

Weighted Average
(For Average scale type only.)

Displays the sum of the competency ratings multiplied by their weight percents.

Total Review Points
(For Summation and Review Band scales only.)

Displays the total review points a reviewer assigned all of the competencies.

Review Totals

Weight (%)
Displays the total percent of reviews completed. For example, if Reviewer 1 has 50 percent weight and Reviewers 2 and 3 each have 25 percent weight, then this field will show 75 percent after Reviewers 1 and 2 have completed their reviews.

Total Review Points
(For Summation and Review Band scales.)

Displays the total review points for the reviews completed up to this point.

Review Result
The system multiplies the total review score for each reviewer by the reviewer weight (taken as a percentage) and adds these weighted review scores.

For Summation and Review Band scale types, the system enters this value on the Employee Review page.

Goals Page

Use the Goals page (EMPLOYEE_REVIEW_4) to review worker goals and objectives.

Navigation

Workforce Development > Employee Review History > Review History > Goals

Image: Goals page

This example illustrates the fields and controls on the Goals page.

Goals

Nbr (number)	Displays the sequence number for the goals that you add.
Goal	The system displays goals from the worker's career plan.
Status	Displays the goal status (for example *Exceeded* or *Met*).

Related Links

"Creating Career Plans" (PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions)

(USF) Viewing Worker Review Information

To view worker review information (USF), use the Review History USF (EMPLOYEE_REVIEW) component.

This section discusses how to view worker review information.

Pages Used to View Worker Review Information (USF)

Page Name	Definition Name	Usage
Employee Appraisal 1 Page	GVT_EMP_REVIEW1	Review worker reviews.
Employee Appraisal 2 Page	GVT_EMP_REVIEW2	Review comments about the overall review.
Employee Appraisal 3 Page	GVT_EMP_REVIEW3	Review worker goals and objectives.

See Also <u>Viewing Worker Review Information</u>

Reporting on Worker Reviews

To generate the worker review report, use the Review Audit (RUN_PER008) component.

This section lists the pages used to run the Employee Review Audit report.

Page Used to Run the Employee Review Audit Report

Page Name	Definition Name	Usage
Review Audit Page	RUNCTL_PER008	Run the Employee Review Audit report (PER008), which lists the worker review data that appears in the Employee Review component.

Related Links
"Basic PeopleSoft HCM Reports: A to Z" (PeopleSoft HCM 9.2: Application Fundamentals)