

# 2021 ePerformance Manager's Guide



# ePerformance *Manager Training Guide*

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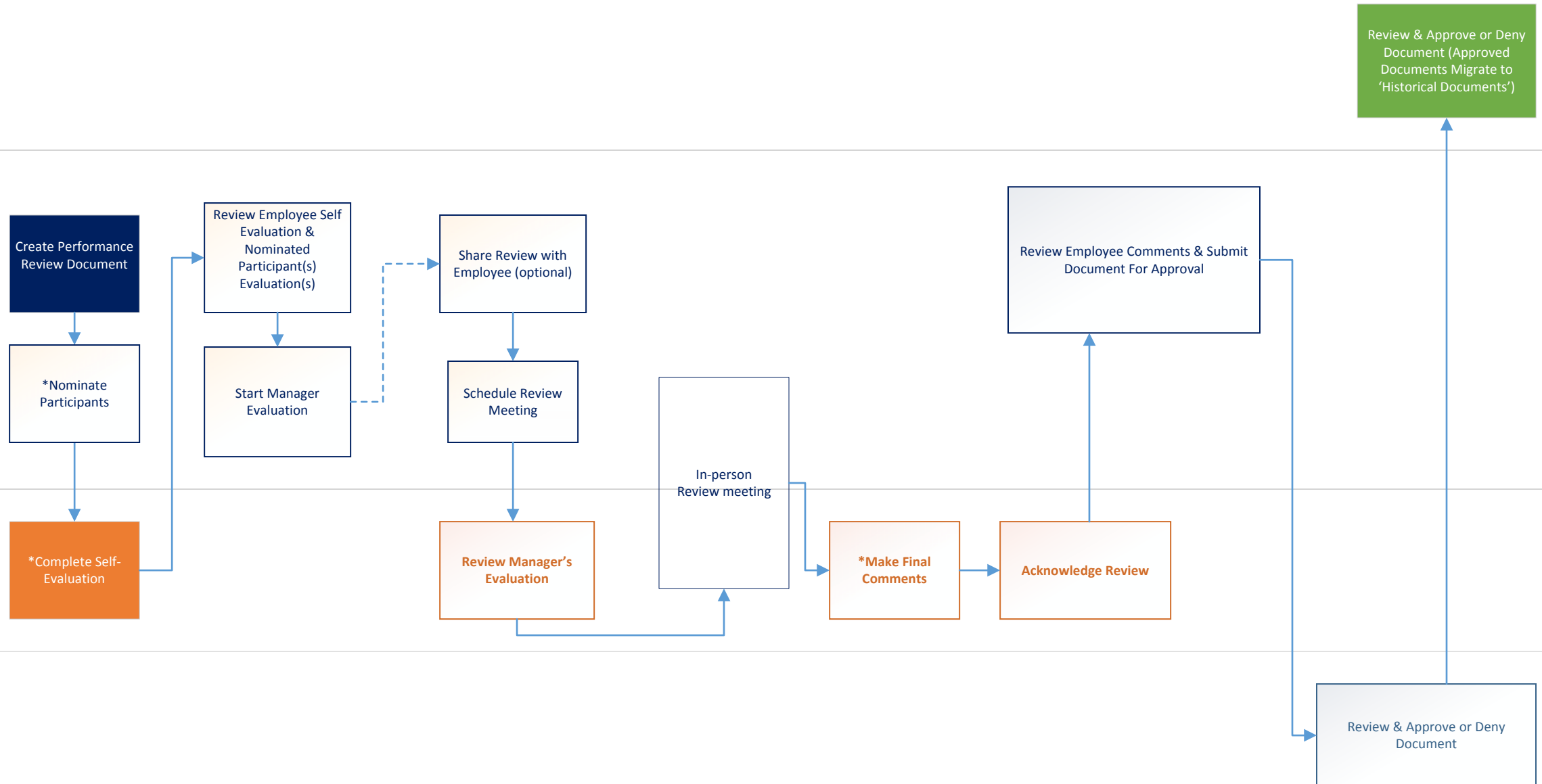
# ePerformance Employee Review Process

HR Compensation

Department Manager/Supervisor

Employee

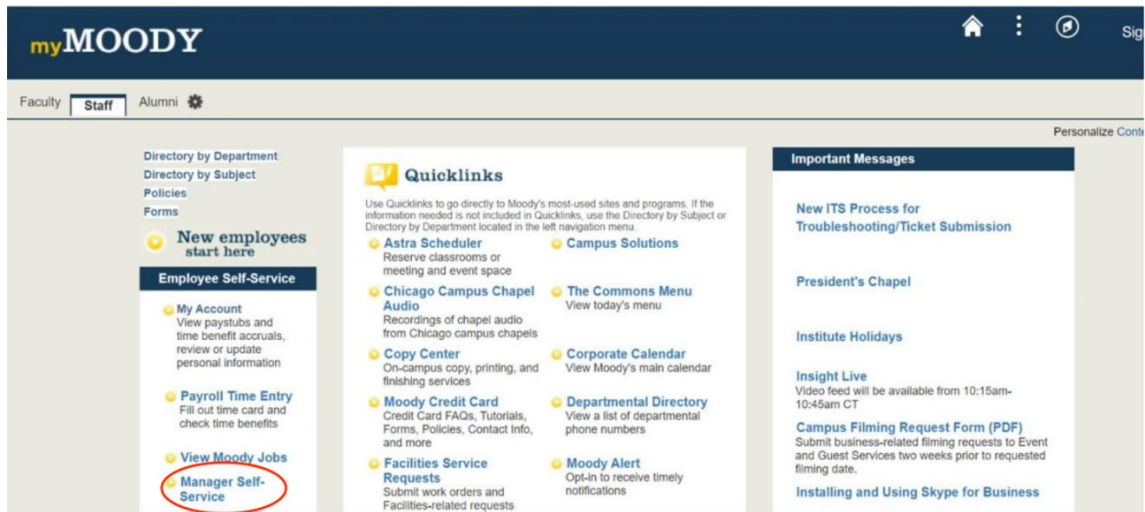
Approving Manager



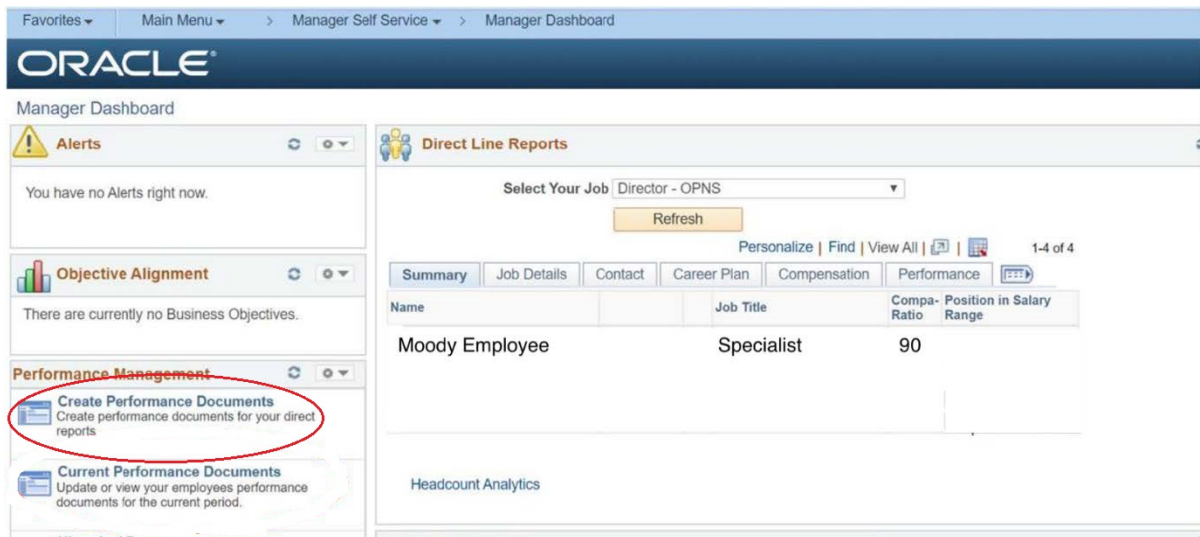
\*=Optional Function

## A. Creating a Performance Review Document

1. Login to MyMoody
2. Select 'Manager Self Service' on the left hand side of the page within the Staff tab.



3. On your Manager Dashboard find the heading titled 'Performance Management' and select sub-heading 'Create Performance Documents' from the options within the menu.



4. You will be navigated to a page where you may then select your employees for review. Select those employees you would like to review this period and select 'Continue'. Make sure your 'As of Date' shows *today's date* to guarantee your most recent reporting structure.

## ePerformance Manager Guide

Favorites > Main Menu > Manager Self Service > Performance Management > Performance Documents > Create Documents

### Create Performance Documents

#### Employee Selection Criteria

Select the employees you are creating new performance documents for.

As Of Date: 05/05/2020

Select Your Job: Director - OPNS

Refresh Employees

- Also check your period begin and end dates for accuracy before proceeding- **(7/1/2020 – 6/30/2021)** for all Full-time and Part-time Professional employees (including Managers) & **11/1/2020 – 10/31/2021** for Vice Presidents & Up).
- Select appropriate performance review document for those employees you've selected and the review period. If you need to edit employees in your list select 'Return to Select Employees' at the bottom of your employee list.

Favorites > Main Menu > Manager Self Service > Performance Management > Performance Documents > Create Documents

### Create Performance Documents

Complete the information in the *Document Creation Details* section below, then select **Create Documents** to generate documents for the employee(s) you previously selected.

#### Document Creation Details

Period Begin Date: 07/01/2018

Period End Date: 06/30/2019

Document Type: Review Cycle: July-June

Template: Professional/Technical

Create Documents

#### Selected Employees

Employee ID	Last Name	First Name
1234567	Employee	Moody

[Return to Select Employees](#)

- When you are ready to create your document(s) select the button 'Create Documents'.

Favorites > Main Menu > Manager Self Service > Performance Management > Performance Documents > Create Documents

### Create Performance Documents

Complete the information in the *Document Creation Details* section below, then select **Create Documents** to generate documents for the employee(s) you previously selected.

#### Document Creation Details

Period Begin Date: 07/01/2018

Period End Date: 06/30/2019

Document Type: Review Cycle: July-June

Template: Professional/Technical

Create Documents

- Next you will get a results page notifying you of your successful creation of a performance review document. Select 'Current Documents' to begin working with your documents.

## ePerformance Manager Guide

Navigation: Favorites ▾ Main Menu ▾ > Manager Self Service ▾ > Performance Management ▾ > Performance Documents ▾ > Create Documents

New Window | Help | Personalize Page

### Create Performance Documents - Results

Below are the results for the employees you selected.


**Selected Employees**

Employee ID	Name	Template	Successful Creation?	Status
1234567	Moody Employee	Professional/Technical	Yes	Document created successfully

Go To [Create Documents](#) [Current Documents](#)

9. Once your documents have been created your employee(s) will immediately get a notification (similar to below) in their email inbox that a review document has been created for them. They may use this URL provided to begin their self-evaluation. *If there are issues with the URL, your employee can access their review through MyMoody*

A performance process has been initiated - Review Cycle: July-June; 07/01/2018 - 06/30/2019.

 PeopleSoft@peoplesoft.com  
Mon 4/13/2020 11:29 AM

This automatic notification is to inform you that the Review Cycle: July-June performance document has been created for you, [redacted]

You have the opportunity to complete a Self-Evaluation by following the link below. If your manager requests you complete this optional evaluation it is recommended you complete it by 05/10/2019 for your Manager's consideration in their review of your performance.

Navigate to: [https://hcm92te.moody.edu/psp/HCM92TE/EMPLOYEE/HRMS/c/ROLE\\_EMPLOYEE.EP\\_NOTIFY.GBL?EP\\_APPRAISAL\\_ID=5113&EP\\_REVIEWER\\_ID=1616395&EP\\_ROLE=E&EP\\_USER\\_ROLE=E&TRANS\\_NAME=BASELINE-CREATE](https://hcm92te.moody.edu/psp/HCM92TE/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE.EP_NOTIFY.GBL?EP_APPRAISAL_ID=5113&EP_REVIEWER_ID=1616395&EP_ROLE=E&EP_USER_ROLE=E&TRANS_NAME=BASELINE-CREATE) to view your performance document now.\*

\*It is recommended that you login to [www.my.moody.edu](http://www.my.moody.edu) in your default browser before activating the link above. If you still experience issues activating the link above try copying and pasting the link into a new browser.

Otherwise download and review the ePerformance Guide on the HR Learning & Development website (found on my.moody.edu > directory by department) or call x4483 for additional resources.

(Please do not respond to this automatic notification.)

10. Within your current document bank select the name of the individual review you would like to begin working on by clicking the blue link within the name column.

Navigation: Favorites ▾ Main Menu ▾ > Manager Self Service ▾ > Performance Management ▾ > Performance Documents ▾ > Create Documents

New Window | Help | Personalize Page

### Current Performance Documents

Listed are the current performance documents for which you are the Manager.

[Filter Criteria](#)

**Performance Documents**

Employee ID	Name	Document Type ▾	Document Status ▾	Period Begin	Period End	Job Title	Next
1234567	Moody Employee	Professional/Technical	Evaluation in Progress				

## ePerformance Manager Guide

**B. Nominating Participating Managers** – *this is a great optional feature when the primary reviewing manager wishes to nominate an additional manager to provide feedback on their employee's performance for the period. This is ideal for dotted line reporting relationships or matrix structures. Note: Employees' will not be able to see participants comments.*

1. Within the document, navigate to the menu on the left hand side and select the hyperlink titled 'Nominate Participants' and then select 'Add Nominees'.

The screenshot shows the 'Manager Evaluation - Update and Share' interface. On the left, the 'Steps and Tasks' sidebar lists several actions, with 'Nominate Participants' circled in red. The main content area displays the 'Manager Evaluation' form for 'Moody Employee'. The form includes fields for Job Title (Specialist), Document Type (Review Cycle: July-June), Template, Status (Evaluation in Progress), Manager (MBI Manager), Period (07/01/2018 - 06/30/2019), Document ID (5113), and Due Date (06/07/2019). Below these fields is the 'Employee Data' section with fields for Employee ID, Department, and Office of VP. The 'Rating History' section is also visible. At the bottom, there are tabs for 'Accomplishments', 'Performance Factors', 'Goals', and 'Employee Comments'.

2. To add your own Manager or another Manager of your choosing, select 'Add Participating Manager'. You may have a maximum of two participating managers providing feedback for any one employee review.

The screenshot shows the 'Nominate Participants - Add Nominees' interface. On the left, the 'Steps and Tasks' sidebar lists several actions, with 'Nominate Participants' circled in red. The main content area displays the 'Nominate Participants' form for 'Moody Employee'. The form includes fields for Job Title (Specialist), Document Type (Review Cycle: July-June), Template (Professional/Technical), Status (In Progress), Manager (MBI Manager), Period (07/01/2018 - 06/30/2019), Document ID (5113), and Due Date (05/01/2019). Below these fields is the 'Participant Role' section with the role 'Participating Manager' and a note 'Minimum Required: 0 Maximum Available:2'. The 'Nominations' section is also visible, stating 'Currently there are no nominees in your nomination list.' At the bottom, there is a red circle around the 'Add Participating Manager' button.

3. Enter search criteria to locate the manager you would like to nominate. From the search results check the box next to the name of the manager and select 'Ok'.

**Person Search** ×

Name

Last Name

Second Last Name

First Name

ACName

**Search**

**Search Results**

☒ Participating Manager ?

**OK**

[Return to Previous Page](#)


4. Review your nomination on the following page and select the 'Save' button to save your nominations and the 'Submit' button in the top right corner of the page when you are ready to send requests to your nominees. On the next page select 'Confirm' you should then receive a confirmation page.

[Return to Current Documents](#) **Save** **Submit Nominations**

**Review Cycle: July-June**

**Nominate Participants - Add Nominees** Notify

Moody Employee  
[Actions](#)



Job Title

Specialist

Document Type

Review Cycle: July-June

Template

Professional/Technical

Status

In Progress

Manager

MBI Manager

Period

07/01/2018 - 06/30/2019

Document ID

5113


Due Date

05/01/2019

✔ You have selected nominations for addition. The nominations will be added when the transaction is saved.

♦ **Participant Role: Participating Manager** Minimum Required: 0 Maximum Available:2

**Nominations**

Nominee	Delete
Participating Manager	

**Submit Nominations** ×

Select confirm to submit nomination requests to the listed nominee's.

**Confirm** **Cancel**



Review Cycle: July-June

[Return to Current Documents](#)**Confirmation - Nominations Submitted**

You have submitted the nominations. You can track the nominees responses by selecting the Track Nominations hyperlink under Nominate Participants.

5. After you have submitted your nomination requests, your nominee(s) will receive an e-mail (similar to below) notifying them that they have been nominated to participate in a review. They can then use the URL provided to accept the nomination and begin providing feedback for the review.

This e-mail notification is to inform you that a request has been submitted for your participation in the review of **Moody Employee, 567** for periods: 07/01/2018 - 06/30/2019.

Follow this link to access the review and accept or reject your nomination for participation:

[https://hcm92te.moody.edu/psp/HCM92TE/EMPLOYEE/HRMS/c/ROLE\\_EMPLOYEE.EP\\_NOTIFY.GBL?EP\\_APPRAISAL\\_ID=5113&EP\\_REVIEWER\\_ID=4214337&EP\\_ROLE=E&EP\\_USER\\_ROLE=O&EP\\_DOC\\_USAGE=P&TRANS\\_NAME=NOM-SUBMIT](https://hcm92te.moody.edu/psp/HCM92TE/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE.EP_NOTIFY.GBL?EP_APPRAISAL_ID=5113&EP_REVIEWER_ID=4214337&EP_ROLE=E&EP_USER_ROLE=O&EP_DOC_USAGE=P&TRANS_NAME=NOM-SUBMIT)

It is recommended that you login to [www.my.moody.edu](http://www.my.moody.edu) in your default browser before activating the link above.

(Please do not respond to this automatic notification.)

6. To check the status of your nomination request(s) you can select 'Track Nominations' under the left side heading 'Nominate Participants'. You will see your nominees' status will either being pending, accepted, or denied. You may also cancel your nomination request on this page.

**Performance Process**

**Steps and Tasks**

- Moody Employee
- Review Cycle: July-June
- 07/01/2018 - 06/30/2019
- Nominate Participants**
  - Due Date: 05/01/2019
  - Add Nominees
  - Track Nominations
- Review Participant Evaluations
  - Due Date: 05/17/2019
- Review Self Evaluation
  - Due Date: 05/10/2019
- Complete Manager Evaluation
  - Due Date: 06/07/2019
- Update and Share

**Review Cycle: July-June** [Return to Current Documents](#)

**Nominate Participants - Track Nominations**

Moody Employee

Job Title: Specialist

Document Type: Review Cycle: July-June

Template: Professional/Technical

Status: In Progress

Manager: MBI Manager

Period: 07/01/2018 - 06/30/2019

Document ID: 5113

Due Date: 05/01/2019

**Participant Role: Participating Manager** Minimum Required: 0 Maximum Available: 1

**Nominations**

Nominee	Status	Cancel
Participating Manager	Pending	<a href="#">Cancel</a>

7. Once your nominee(s) has accepted your nomination you will receive an e-mail notification (similar to the one below).

## ePerformance Manager Guide

PeopleSoft@peoplesoft.com Thu 5/14

**A nomination request has been accepted for Annual Review-July/June for Moody Employee**

This automatic notification is to inform you that a nomination request for Moody Employee Annual Review-July/June performance document.

Follow this link [https://hcm92te.moody.edu/psp/HCM92TE/EMPLOYEE/HRMS/c/ROLE\\_EMPLOYEE\\_EP\\_NOTIFY.GBL?EP\\_APPRAISAL\\_ID=5113&EP\\_REVIEWER\\_ID=1616395&EP\\_ROLE=M&EP\\_USER\\_ROLE=E&TRANS\\_NAME=RQST-REVIEW](https://hcm92te.moody.edu/psp/HCM92TE/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE_EP_NOTIFY.GBL?EP_APPRAISAL_ID=5113&EP_REVIEWER_ID=1616395&EP_ROLE=M&EP_USER_ROLE=E&TRANS_NAME=RQST-REVIEW) to go directly to your prepared Review Cycle: July-June.\*

\*It is recommended that you login to [www.my.moody.edu](http://www.my.moody.edu) in your default browser before activating the link above.If you still experience issues activating the link above try copying and pasting the link into a new browser.

Otherwise download and review the ePerformance Guide on the HR Learning & Development website (found on my.moody.edu>directory by department) or call x4483 for additional resources.

(Please do not respond to this automatic notification.)

8. Additionally, once your nominee(s) have provided feedback on your employees' performance you will receive an e-mail notification and they will be listed as an additional participant on your review. You will be able to view their ratings and comments from the left hand menu under the heading 'Review Participant Evaluations' then 'View'. This will open a new browser window so be sure any pop-blockers are disabled on your internet browser. Note: Please use this view of participants' feedback to copy and paste their feedback into your manager document.

PeopleSoft@peoplesoft.com Thu 5/14

**Nominated Participant has completed review of Annual Review-July/June document for Moody Employee**

A nominated participant has completed review of Annual Review-July/June document for Moody Employee

Follow this link [https://hcm92te.moody.edu/psp/HCM92TE/EMPLOYEE/HRMS/c/ROLE\\_EMPLOYEE\\_EP\\_NOTIFY.GBL?EP\\_APPRAISAL\\_ID=5113&EP\\_REVIEWER\\_ID=1616395&EP\\_ROLE=M&EP\\_USER\\_ROLE=E&TRANS\\_NAME=RQST-REVIEW](https://hcm92te.moody.edu/psp/HCM92TE/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE_EP_NOTIFY.GBL?EP_APPRAISAL_ID=5113&EP_REVIEWER_ID=1616395&EP_ROLE=M&EP_USER_ROLE=E&TRANS_NAME=RQST-REVIEW) to go directly to your prepared Review Cycle: July-June.\*

\*It is recommended that you login to [www.my.moody.edu](http://www.my.moody.edu) in your default browser before activating the link above.If you still experience issues activating the link above try copying and pasting the link into a new browser.

Otherwise download and review the ePerformance Guide on the HR Learning & Development website (found on my.moody.edu>directory by department) or call x4483 for additional resources.

(Please do not respond to this automatic notification.)

Performance Process

Steps and Tasks

Moody Employee  
Review Cycle: July-June  
07/01/2018 - 06/30/2019

- Nominate Participants  
Due Date 05/01/2019
- Review Participant Evaluations**  
Due Date 05/17/2019
- Review Self Evaluation  
Due Date 05/10/2019
- Complete Manager Evaluation  
Due Date 06/07/2019

Update and Share

Pending Acknowledgement

Submit for Approval

Review Participant Evaluations

Review Cycle: July-June

Manager Evaluation - Update and Share

Print | Notify

Specific Commendations Summary

Manager Comments  
Writing Tools

Participant Feedback

Participant	Role	Comments
	Participating Manager	Moody Employee does a great job!

## ePerformance Manager Guide

### C. Viewing Employees' (Optional) Self-Evaluation

1. You should get an e-mail notification (similar to below) when your employee has completed the self-evaluation. Select the URL link provided to access their comments.

Moody Employee (1234567) has completed the Employee Self Evaluation for Review Cycle: July-June, 07/01/2018 - 06/30/2019.

Navigate to:

[https://hcm92te.moody.edu/psp/HCM92TE/EMPLOYEE/HRMS/c/ROLE\\_EMPLOYEE.EP\\_NOTIFY.GBL?EP\\_APPRAISAL\\_ID=5113&EP\\_REVIEWER\\_ID=0369983&EP\\_ROLE=M&EP\\_USER\\_ROLE=M&TRANS\\_NAME=EM\\_PDOC-COMPLETE](https://hcm92te.moody.edu/psp/HCM92TE/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE.EP_NOTIFY.GBL?EP_APPRAISAL_ID=5113&EP_REVIEWER_ID=0369983&EP_ROLE=M&EP_USER_ROLE=M&TRANS_NAME=EM_PDOC-COMPLETE) to view your employees self-evaluation now.\*

\*It is recommended that you login to [www.my.moody.edu](http://www.my.moody.edu) in your default browser before activating the link above. If you still experience issues activating the link above try copying and pasting the link into a new browser.

Otherwise download and review the ePerformance Guide on the HR Learning & Development website (found on my.moody.edu>directory by department) or call x4483 for additional resources.

(Please do not respond to this automatic notification.)

2. You will be navigated to your evaluation. Select 'Review Self-Evaluation' on the left hand side menu of the page then 'view' – be sure any pop-blockers are disabled on your internet browser.

The screenshot displays the ePerformance Manager web application. The top navigation bar includes 'Favorites', 'Main Menu', and a user profile 'Mail - Joe Bolz - Outlook'. The main content area is titled 'Performance Process' and shows a 'Review Cycle: July-June' for the period '07/01/2018 - 06/30/2019'. The left sidebar, under 'Steps and Tasks', lists several actions: 'Nominate Participants' (Due Date: 05/01/2019), 'Review Participant Evaluations' (Due Date: 05/17/2019), 'Review Self Evaluation' (Due Date: 05/10/2019), and 'Complete Manager Evaluation' (Due Date: 06/07/2019). The 'Review Self Evaluation' option is circled in red. Below the sidebar, the main content area shows the 'Manager Evaluation - Update and Share' form. The form has tabs for 'Accomplishments', 'Performance Factors', 'Goals', and 'Employee Comments'. The 'Accomplishments' tab is selected, showing a 'Section 1 - Accomplishments' with an 'Expand' button. Below this is a text area for 'Manager Comments' with a 'Writing Tools' toolbar.


3. Within the Self-Evaluation select 'Expand All' to see the expanded evaluation form and all its contents.

## ePerformance Manager Guide

Review Cycle: July-June

**Self-Evaluation - Completed** [Print](#) | [Notify](#)

Moody Employee  
[Actions](#)



Job Title	Specialist	Manager	MBI Manager
Document Type	Review Cycle: July-June	Period	07/01/2018 - 06/30/2019
Template		Document ID	5114
Status	Completed	Due Date	05/10/2019

▼ **Employee Data**

Employee ID	1234567	
Department	2150	Office of VP Human Resources

[Rating History](#)

The document status is Completed.

[Expand All](#) | [Collapse All](#) | [TAB Format](#) | [Reopen](#)

▼ **Section 1 - Accomplishments**

[Expand](#) | [Collapse](#)

4. You should then see your employees' commentary within any sections titled 'Employee Comments'. If your employee has not completed their self-evaluation you will see 'Employee has not completed their self-evaluation' within the employee comments fields.

[Return to Current Documents](#) [Save](#) [Complete](#)

Review Cycle: July-June

**Self-Evaluation - Update and Complete** [Print](#) | [Notify](#)

▼ **Section 2 - Employee Goals**

Enter ratings and comments for each goal listed below, if applicable.

[Expand](#) | [Collapse](#)

▼ **Goal 1: Goals and Objectives**

**Description :** Areas of desired accomplishments, including areas of improvement, during the upcoming review period - include measurer target dates for completion.

Employee Comments

1. Develop Leadership Skills

2. Collaborate with other departments

Created By **Template** 04/13/2020 11:29AM

5. You should also see employee comments within your own performance document – these comments will be published with your completed manager document to your approving manager and Human Resources.

## D. Sharing Review with Employee & Requesting Acknowledgement

1. Once you have reviewed your employees' and participants' optional comments and made your own comments and ratings for the review you may share the review with the employee, once you do this your employee will be able to see all ratings and comments you've made. \*Note: You can do this either before or after the in-person review meeting is held.
2. To do this, select 'Share with Employee' in the top right corner of the review. Then select 'Confirm'. Look for the green check mark confirming success.

The screenshot shows the 'Performance Process' interface. On the left is a 'Steps and Tasks' sidebar with items like 'Nominate Participants', 'Review Participant Evaluations', 'Review Self Evaluation', and 'Complete Manager Evaluation'. The main area is titled 'Manager Evaluation - Update and Share' and shows 'Section 5 - Performance Factors'. Under 'Analytical Skills', there is a description, a weight field set to 0%, and a manager rating of 0.00. A 'Share with Employee' button is circled in red in the top right corner of the main area. Other buttons like 'Save', 'Print', and 'Notify' are also visible.

The 'Share with Employee' dialog box contains the following text:

Select confirm to share this document with the employee. Next you should meet with the employee to discuss your evaluation.

Upon selecting confirm your electronic signature will be added to this document.

At the bottom, there are two buttons: 'Confirm' and 'Cancel'.

## ePerformance Manager Guide

The screenshot shows the ePerformance Manager interface. On the left, the 'Performance Process' sidebar lists steps: 'Nominate Participants' (Due Date: 05/01/2019), 'Review Participant Evaluations' (Due Date: 05/17/2019), 'Review Self Evaluation' (Due Date: 05/10/2019), and 'Complete Manager Evaluation' (Due Date: 06/07/2019). The 'Complete Manager Evaluation' step is expanded, showing 'Update and Share' (selected), 'Pending Acknowledgement', and 'Submit for Approval'. The main content area shows 'Review Cycle: July-June' and 'Confirmation - Shared with Employee'. A message states: 'You have successfully shared your evaluation with the employee.'

3. Your employee will get a notification (similar to below) that you have shared the document with them and they will now able to view it.

The screenshot shows an email notification from PeopleSoft@peoplesoft.com. The subject is 'Your manager has shared Review Cycle: July-June, 07/01/2018 - 06/30/2019 with you'. The email body states: 'This automatic notification is to alert you that your manager has shared Review Cycle: July-June document with you and it is now ready for your review and initial employee comments. Your manager will be contacting you to schedule an in-person review meeting if you have not already met to discuss the review. The final review will be due 06/07/2019. Follow this link [https://hcm92te.moody.edu/psp/HCM92TE/EMPLOYEE/HRMS/c/ROLE\\_EMPLOYEE.EP\\_NOTIFY.GBL?EP\\_APPRAISAL\\_ID=5113&EP\\_REVIEWER\\_ID=1616395&EP\\_ROLE=M&EP\\_USER\\_ROLE=E&TRANS\\_NAME=ROST-REVIEW](https://hcm92te.moody.edu/psp/HCM92TE/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE.EP_NOTIFY.GBL?EP_APPRAISAL_ID=5113&EP_REVIEWER_ID=1616395&EP_ROLE=M&EP_USER_ROLE=E&TRANS_NAME=ROST-REVIEW) to go directly to your prepared Review Cycle: July-June.\* \*It is recommended that you login to [www.my.moody.edu](http://www.my.moody.edu) in your default browser before activating the link above. If you still experience issues activating the link above try copying and pasting the link into a new browser. Otherwise download and review the ePerformance Guide on the HR Learning & Development website (found on my.moody.edu> directory by department) or call x4483 for additional resources. (Please do not respond to this automatic notification.)

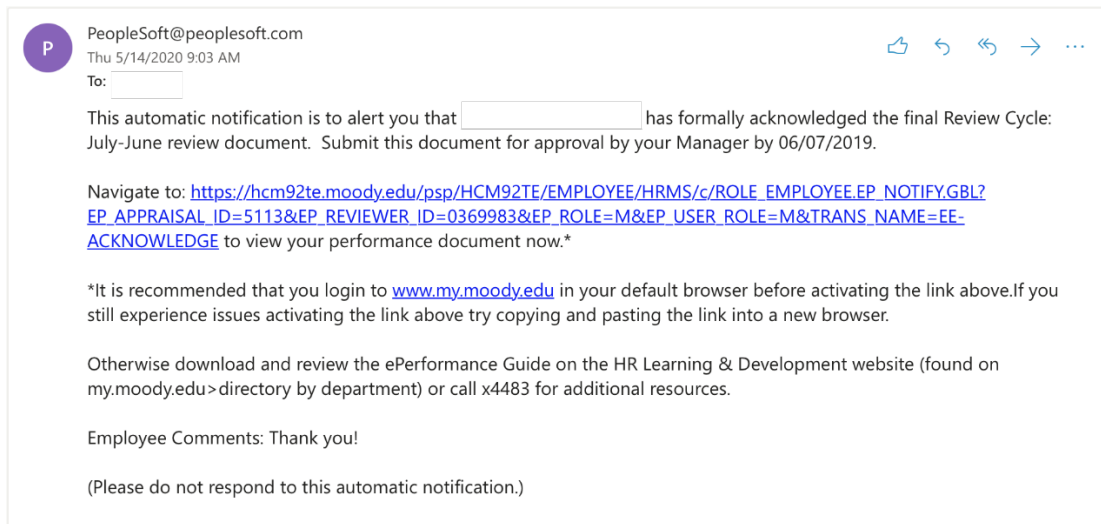
4. Once you have had one on one meeting and the review is completed and shared, it's time to request share the review with your employee, if you haven't already done so. This provides your employee the opportunity to offer their final comments and to acknowledge or "sign" the finalized review prior to approval. Check the status of your document within 'current documents' to check that your document is shared with your employee.

The screenshot shows the 'Current Documents' page in the ePerformance Manager interface. The breadcrumb trail is: 'Favorites > Main Menu > Manager Self Service > Performance Management > Performance Documents > Current Documents'. The page lists the current performance documents for which the user is the Manager. There is a 'Filter Criteria' section with fields for 'First Name', 'Last Name', 'Document Type', 'Document Status', and 'Period Between'. Below the filters are 'Filter' and 'Clear' buttons. The 'Performance Documents' table shows the following data:

Employee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title	Ne
1234567	Moody Employee	Review Cycle: July-June	Pending Acknowledgement	07/01/2018	06/30/2019		06/07/2019

## E. Submitting Acknowledged Performance Review

1. Once your employee acknowledges the review you will receive a notification email. Use the URL link provided to access the document and review employees' final comments before your submission.



2. Select 'Expand All' to open all sections of the document and view the last section 'Employee Comments' to view employees' comments before submitting.
3. Once you have reviewed the document and you are ready to submit the document to your Manager for approval select the 'Submit for Approval' button in the top right corner of your document.


Return to Current Documents
Submit for Approval

**Review Cycle: July-June**

**Manager Evaluation - Submit**

Print | Notify

Actions ▾



**Job Title**

**Document Type** Review Cycle: July-June

**Template**

**Status** Acknowledged

**Manager** Ludwig L. Anderson

**Period** 07/01/2018 - 06/30/2019

**Document ID** 5113

**Due Date** 06/07/2019

▼ **Employee Data**

**Employee ID**

**Department** 2150

Rating History

This Evaluation has been Acknowledged and is ready to be completed.

If Approval is required you will need to select the Submit for Approval button to route the document to the appropriate approvers. If approval is not required, select the Complete button to finalize this document.

4. Then select 'confirm'. Look for green check mark confirming success. At that time you should also receive an e-mail confirming document submission (similar to below).

**Submit for Approval** ✕

Select confirm to submit this document for approval.

Once you select confirm the document will be routed to the appropriate individuals for approval. You will be notified when this document has been approved.

**Data**

	Job Title	Department	Supervisor Name	Company
<input checked="" type="checkbox"/>	Director - OPNS			Moody Bible Institute

---

**Review Cycle: July-June** [Return to Current Documents](#)

**Confirmation - Approval Submitted**

✔ You have successfully submitted this document for approval.

The following request was successfully submitted for approval(s). You will be notified when it is approved or denied by each approver.

Submitted Request

Employee ID:

Employee Name:

Transaction: Performance Document

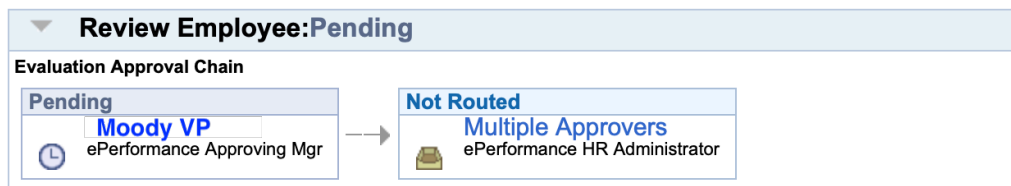
Please visit the following url for detailed information about the request:

hcm92te.moody.edu/psp/HCM92TE/EMPLOYEE/HRMS/c/ROLE\_MANAGER.EP\_APPRAISAL\_STAT.GBL?  
Page=EP\_APPRAISAL\_EE&Action=U&EP\_APPRAISAL\_ID=5113

This communication was sent via Oracle Workflow Technology. Please do not reply to this email.

5. Select URL link provided in e-mail body to check on approval status of your submitted document.

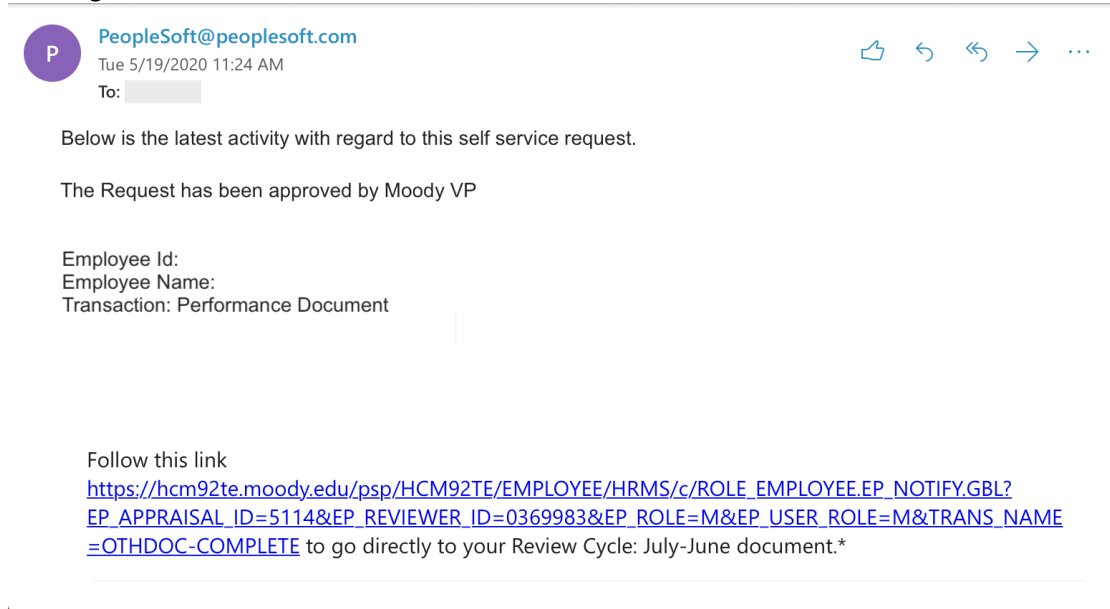
## Evaluation Approval Chain



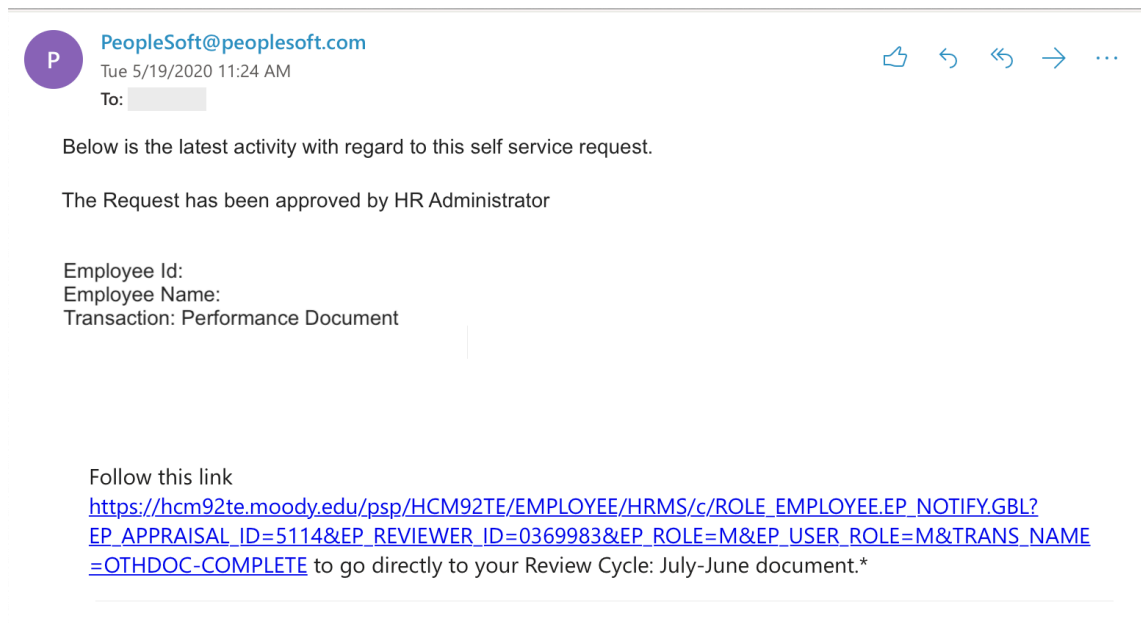
6. Once your manager has made a decision to approve or deny your submitted document you will receive an e-mail notification regarding their decision.



## ePerformance Manager Guide



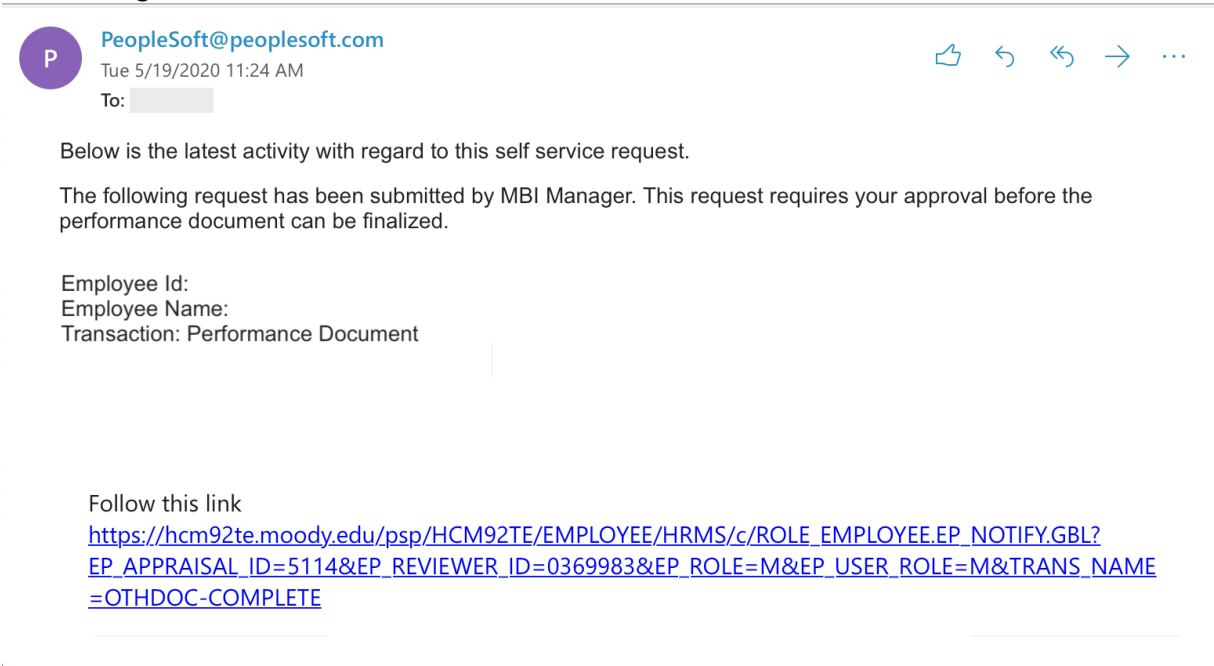
7. Given your manager approves the document, you will receive a similar e-mail regarding approval or denial by the ePerformance HR Administrator. In the event it is approved by HR you will have completed your performance review and no additional steps are required of you in regards to the ePerformance process.



**F. Approving Submitted Documents** – *If you have managers’ performing reviews this performance review period you will be prompted by the system to approve or deny documents submitted for approval. Upon approval documents will be automatically routed to HR for approval. If denied, the document will be reset to “Evaluation in Progress” and no prior work will be lost.*

1. When your direct report submits a document for approval you will get an email notification providing a URL link for you to access the document.

## ePerformance Manager Guide



2. Select the document you want to work with in your approve transaction list.

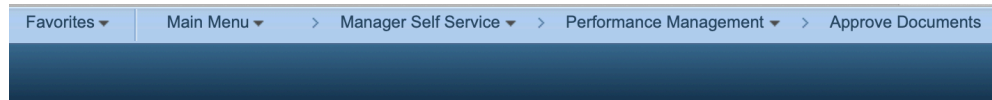
The screenshot shows the 'Approve Documents' page. The breadcrumb trail is: Favorites > Main Menu > Manager Self Service > Performance Management > Approve Documents. The page title is 'Select Transaction to Approve'. Below the title, it states: 'The following hyperlinks indicate employees which require your participation in an approval process. Select on a hyperlink to see details about what needs to be approved for each employee'. There is a link 'Filter Criteria'. Below this, the section 'Performance Document' is highlighted. It contains a table with the following data:

Name	Begin Date	End Date	Document Status	Approval Status	Submitted By	Document Type
	07/01/2018	06/30/2019	Approval	Submitted		Review Cycle: July-June

3. On the approval page you can view the document in its entirety by selecting the blue hyperlink 'Performance Document Details'. Once you have reviewed the document you can return to your approval page by selecting the

## ePerformance Manager Guide

blue hyperlink at the bottom titled 'Return to Performance Document Approval'.



### Approve Document

Approve or deny the proposed information for the employee listed here. You may also enter optional comments about each approval choice. When you are finished, select the Approve or Deny button on the page.

Empl ID 1616395

Actions ▾

#### Performance Document

Doc Type Review Cycle: July-June

Author Ludwig L. Anderson

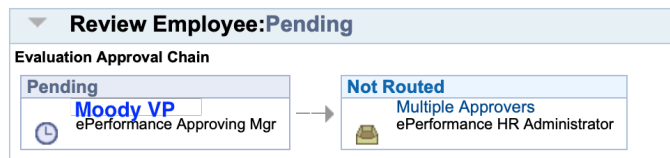
Period Begin Date 07/01/2018

Period End Date 06/30/2019

Rating

[Performance Document Details](#)

### Evaluation Approval Chain



Comment

Performance Process

Steps and Tasks

- Nominate Participants Due Date 05/01/2019
- Review Participant Evaluations Due Date 05/17/2019
- Review Self Evaluation Due Date 05/10/2019
- Complete Manager Evaluation Due Date 06/07/2019
  - Update and Share
  - Pending Acknowledgement
  - Submit for Approval

Moody Employee  
Review Cycle: July-June  
07/01/2018 - 06/30/2019

Review Cycle: July-June

Manager Evaluation - Submit

This Evaluation has been Acknowledged and is ready to be completed.

If Approval is required you will need to select the Submit for Approval button to route the document to the appropriate approvers. If approval is select the Complete button to finalize this document.

Long Format | View Graphical Rating | Reopen

Accomplishments | Performance Factors | Goals | Employee Comments

Section 8 - Employee Comments

Employee Comments

Thank you

Return to Current Documents

Submit for Approval

Print | Notify

- Back in the approval page you can make comments and, based on your review of the document then select to either approve or deny the document.

**Performance Document**

Doc Type Review Cycle: July-June

Author

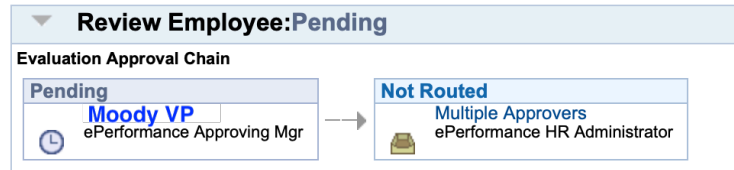
Period Begin Date 07/01/2018

Period End Date 06/30/2019

Rating

[Performance Document Details](#)

## Evaluation Approval Chain



Comment Great job

Go To [Approval Summary](#)

5. You will receive a confirmation of your decision and your direct report will receive notification (similar to below) of your action taken.

[Approve Document](#)

[Save Confirmation](#)

✓ The Save was successful.

To:

Below is the latest activity with regard to this self service request.

The request has been approved by

Employee Id:

Employee Name:

Transaction: Performance Document

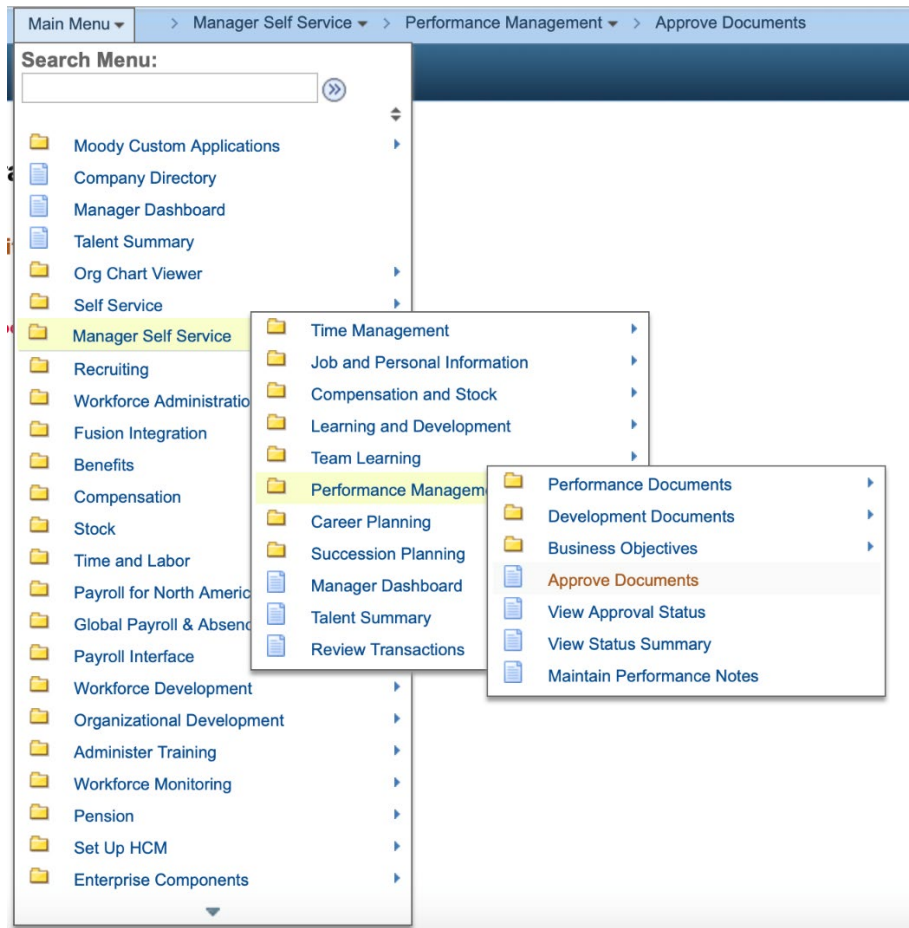
Please visit the following URL for detailed information about the request:

hcm92te.moody.edu/psp/HCM92TE/EMPLOYEE/HRMS/c/ROLE\_MANAGER.EP\_APPRAISAL\_STAT.GBL?  
Page=EP\_APPRAISAL\_EE&Action=U&EP\_APPRAISAL\_ID=5113

This communication was sent via Oracle Workflow Technology. Please do not reply to this email.

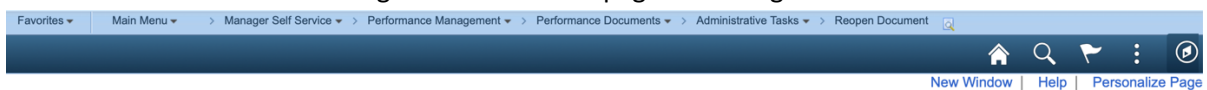
## ePerformance Manager Guide

6. Tip: In the event that you cannot access by e-mail. You can always access documents awaiting your approval by selecting 'Main Menu' > 'Manager Self Service' > 'Performance Management' > 'Approve Documents'.



### G. Performing Supplemental Functions – Reopening, Adding Attachments to, Canceling, Deleting, and Viewing Status of Documents

1. **Reopening a Document:** Reopening a document sets it back to its original status “In-Progress” allowing you to edit the document further. When you reopen a document your saved work will remain intact. You can re-open a document by going to ‘Performance Management’ > ‘Performance Documents’ > ‘Administrative Tasks’ > ‘Reopen Document’. Select the document you would like to reopen and select ‘Continue’, review your selection and hit ‘Save’ to confirm. You should get a confirmation page indicating success.



#### Reopen Document






To change a performance document's status back to "Evaluation", select the checkbox next to the Employee's Name and then select the Continue push button. Only "Share with Employee", "Pending Acknowledgement", "Acknowledged", or "Approval" (with Approval Status of "Submitted" or "Approved") documents can be changed back to "Evaluation".

#### Performance Documents

Performance Documents							
<div>⌵ 🔍</div> <div>1-2 of 2</div>							
	Employee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title
<input type="checkbox"/>			Review Cycle: July-June	Pending Acknowledgement			

## ePerformance Manager Guide

Favorites ▾Main Menu ▾Manager Self Service ▾Performance Management ▾Performance Documents ▾Administrative Tasks ▾Reopen Document





New Window | Help | Personalize Page



Reopen Document

Confirm Reopen Document

Performance Documents



1-1 of 1



Employee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title
		Employee Review July-June	Acknowledged	7/1/2018	6/30/2019	

You have chosen to change the status of the performance document listed. The status will be changed to **In Progress**. To confirm this status change, select the **Save** button.

Save

[Return to Previous Page](#)

## Reopen Document

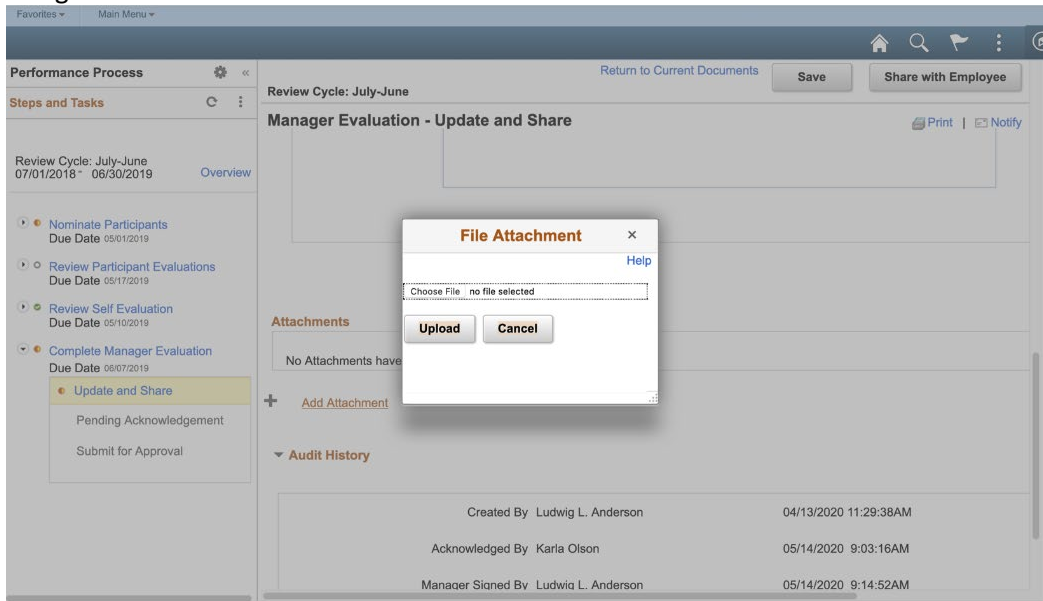
### Save Confirmation

 The Save was successful.

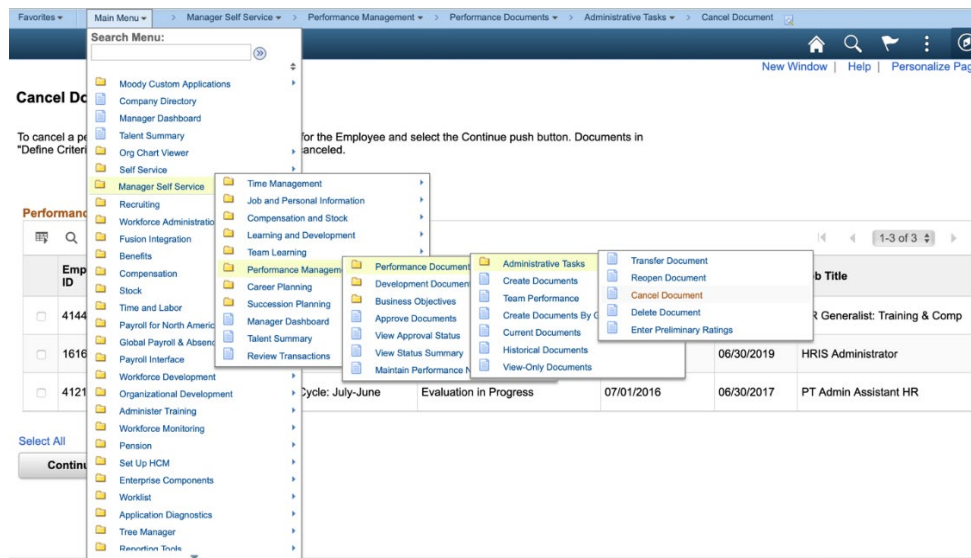
OK

- Adding Attachments to a Document: As part of your review you may want to add attachments that contribute to the performance review of the employee. ePerformance accepts a variety of documents which include but aren't limited to PDF, Word, Excel, JPG etc. In order to do this you will scroll to the bottom of your manager document and select the link titled 'Add Attachments'. Browse your files, select file and upload to your review. You may then type a description of the document and select the appropriate audience by file. You can delete any attachment by clicking the trash can icon next to the file. You can add more attachments by selecting 'Add Attachments' at the bottom.*

## ePerformance Manager Guide



3. **Canceling a Document:** (\*Note: You may need to reopen a document before you can cancel it) To cancel a document go to 'Performance Management' > 'Performance Documents' > 'Administrative Tasks' > 'Cancel Document'. Select the document you would like to cancel and select 'Continue' then review your selection and hit 'Save' to confirm. You should get a confirmation page indicating success.



## ePerformance Manager Guide

Cancel Document

To cancel a performance document, select the checkbox for the Employee and select the Continue push button. Documents in "Define Criteria or Track Progress or Evaluation" can be canceled.

**Performance Documents**

Employee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title
<input type="checkbox"/>		Review Cycle: July-June	Evaluation in Progress	7/1/2018	6/30/2019	

Select All      Deselect All

**Continue**

Cancel Document

**Confirm Cancellation**

**Performance Documents**

Employee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title
1234567	Moody Employee	Review Cycle: July-June	Evaluation in Progress	7/1/2018	6/30/2019	

You have chosen to cancel the performance documents listed.  
To confirm this cancellation, select the **Save** button.

**Save**      [Return to Previous Page](#)

Cancel Document

**Save Confirmation**

✓ The Save was successful.

**OK**

4. *Deleting a Document: (\*Note: Only previously cancelled documents can be deleted)* To Delete a document go to 'Performance Management' > 'Performance Documents' > 'Administrative Tasks' > 'Delete Document'. Select the document you would like to delete and select 'Continue' then review your selection and hit 'Save' to confirm. When you get a confirmation page, click 'OK'.

Cancel Document

**Save Confirmation**

✓ The Save was successful.

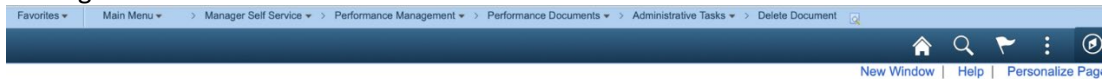
**OK**

**Administrative Tasks**

- Create Documents
- Team Performance
- Create Documents By Group
- Current Documents
- Historical Documents
- View-Only Documents
- Transfer Document
- Reopen Document
- Cancel Document
- Delete Document**
- Enter Preliminary Ratings



## ePerformance Manager Guide



### Delete Documents

To delete a performance document, select the checkbox next to the Employee's Name and then select the Continue push button. Only "Canceled" performance documents can be deleted.

**Performance Documents**

Employee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title
<input type="checkbox"/> 1234567	Moody Employee	Review Cycle: July-June	Canceled	7/1/2018	6/30/2019	

Select All      Deselect All

**Continue**



### Delete Documents

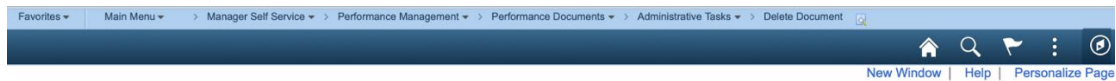
#### Confirm Delete

**Performance Documents**

Employee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title
1234567	Moody Employee	Review Cycle: July-June	Canceled	7/1/2018	6/30/2019	

You have chosen to delete the performance documents listed. To confirm this delete, select the **Save** button.

**Save**      [Return to Previous Page](#)



### Delete Documents

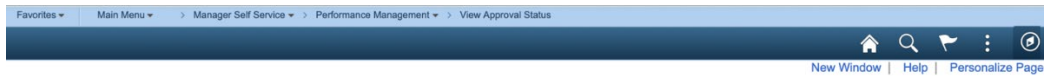
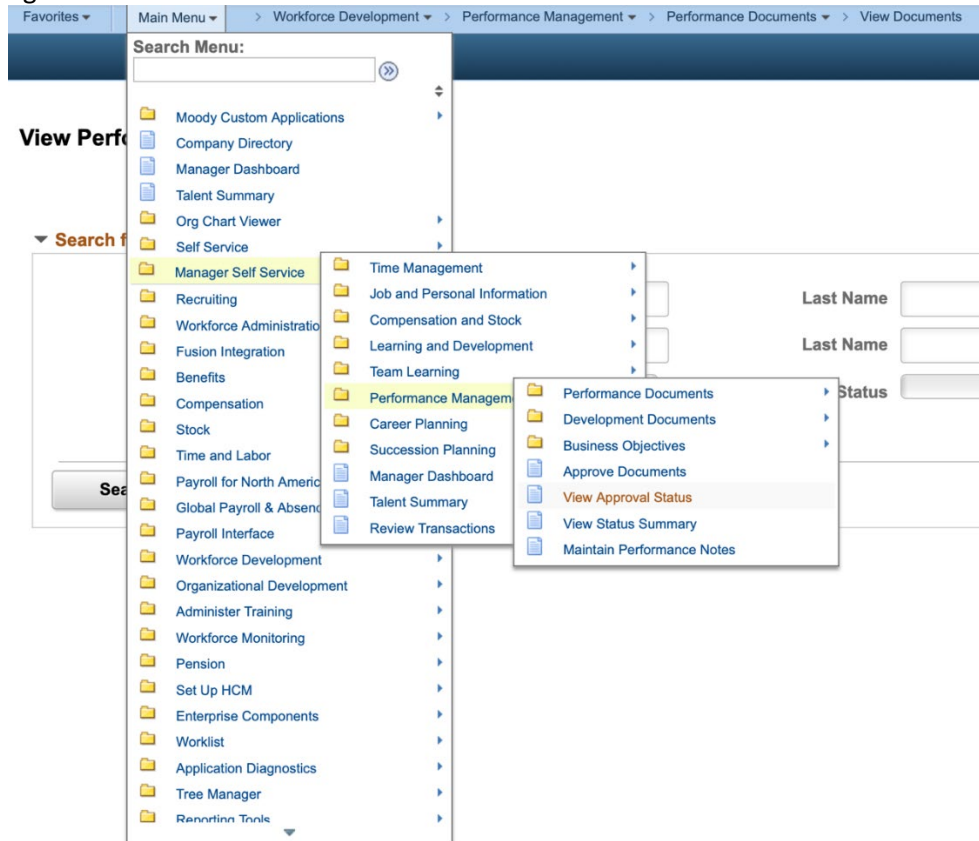
#### Save Confirmation

✓ The Save was successful.

**OK**

5. **View Approval Status of a Document:** (\*Note: You must have submitted a document for approval to use this function). In order to view approval status go to 'Performance Management > View Approval Status. Use search fields to find the document. Select the document to see who is included in the approval chain and whether their decision is pending, approval or denial.

## ePerformance Manager Guide

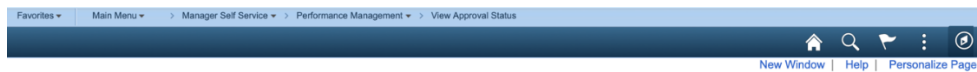


### View Approval Status Summary

Enter some Selection Criteria and then select Search to find employees for which you are a participant in the approval process. Then, select a hyperlink to see details about the status of each transaction.

**Filter Criteria**

First Name	<input type="text"/>	Last Name	<input type="text"/>
Manager First Name	<input type="text"/>	Last Name	<input type="text"/>
Document Type	<input type="text"/>	Approval Status	<input type="text"/>
Period Between	<input type="text"/>		<input type="text"/>



### View Approval Status Detail

Review the status of each transaction request.

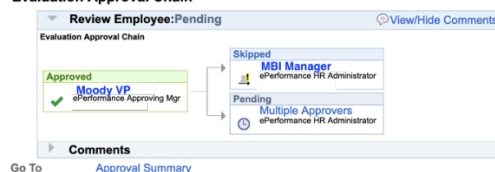
Moody Employee Empl ID 1234567

#### Performance Document

Doc Type Review Cycle: July-June  
Author MBI Manager  
Period Begin Date 7/1/2018 Period End Date 6/30/2019  
Rating

[Performance Document Details](#)

### Evaluation Approval Chain



Competency	Title	Description	Employee Review	Professional/Technical Review	Supervisor Review
ADMIN	Administrative	Administrative duties (i.e. timeslips, expense reports, P-card reconciliation).			
ANLYTCL	Analytical Skills	Collects and researches data, identifies data relationships, synthesizes complex or diverse information and presents relevant data to stakeholders.		X	
BDGTMGMT	Budget Management	Shows wise discernment and stewardship of allocated budget for work unit(s).			
CHGMGMT	Change Management	Adapting oneself and leading others in the face of organizational change			
CMPS	Performance Management	Sets, communicates, and gains commitment to achievable but challenging expectations. Monitors, measures, and coaches performance against set expectations.			
CNFLCT	Conflict Management	Facilitates constructive conflict resolution, accommodates or seeks compromise when appropriate.			X
COMMCS	Communication	Connects with peers, customers, students and donors, actively listens, clearly and effectively shares information, demonstrates effective oral and written communication skills. Is honest, yet kind and discreet.	X	X	
COMMGR	Communication (Supervisory)	Is approachable, develops trust, effectively communicates "up" and "down" the organization, and builds self-image of staff.			X
CREATINT	Innovation	Displays original thought, creativity and resourcefulness. Develops and suggests innovative approaches and ideas to improve work		X	
CRISMGMT	Crisis Management	Accurately identifies crises, communicates through established channels, delegates as needed while maintaining appropriate demeanor.			
CSTMRMKT	Customer & Market Knowledge	Customer Knowledge, Market Analysis, and Input to Management			
DELGT	Delegation	Delegates responsibility and attendant authority, establishes accountability. Demonstrates confidence in subordinates.			X
DEPND	Dependability	Can be relied upon to complete tasks as assigned; amount of required supervision and instruction is appropriate.	X		
DRCT	Directability	Follows Instructions and responds to training to improve performance and effectiveness.			
EQUIP	Equipment Troubleshooting	Able to systematically approach equipment failures based on good engineering practices.			
FDBCK	Feedback	Seeks feedback at appropriate times and through appropriate channels. Intentionally applies feedback into work.			
INCLUSV	Inclusiveness	Shows respect for people and their differences; promotes fairness and equity; engages the talents, experiences, and capabilities of others; fosters a sense of belonging; works to understand the perspectives of others; and creates opportunities for access and success.			X
INITIV	Initiative	Proactive in performing assigned duties; is resourceful, and seeks additional tasks when the workload permits.	X	X	
JDGMT	Judgment	Acts with reason and thoughtfulness; makes good use of available information in reaching decisions.	X	X	
KNOW	Job Knowledge	Possesses knowledge and expertise appropriate for the position; applies knowledge to assigned tasks.	X		
MNTR	Mentorship	Walks alongside mentees as a dedicated guide in developing specific skills and knowledge that will enhance the mentees professional, personal, and spiritual growth.			

		As a higher education and media ministry, Moody exists to equip people with the truth of God's Word to be maturing followers of Christ who are making disciples around the world.			
MSSN1	Fulfillment of Moody Mission	Employee demonstrates understanding and support of the mission of Moody Bible Institute.			
MSSN3	Fulfillment of Moody Values	1) The Authority of the Word of God 2) The Worth and Dignity of the Individual 3) The Practice of Integrity 4) The Centrality of the Church 5) The Priority of Servanthood 6) The Responsibility of Stewardship 7) The Call to Evangelism Employee demonstrates understanding and support of the values of Moody Bible Institute.			
MTNGLD	Meeting Leadership	Arrives early, is prepared, and uses meeting time efficiently and effectively through appropriate topics and facilitation of the meeting process.			
ONAIR	On-air Presence	Good use of voice and microphone technique, natural and relatable, genuine and believable, shows energy and vitality, ability to both ad-lib and read copy with few mistakes.			
PLNORGEE	Planning & Organizing (Empl)	Plans, organizes and schedules work effectively; makes good use of time.	X		
PLNORGMG	Planning & Organizing (Spvsr)	Coordinates plans and schedules, monitors progress within schedules, models good use of time and plans for additional resources.			X
PLNORGTC	Planning & Organizing (ProTch)	Plans and schedules work, prioritizes projects, manages complex tasks and competing demands.		X	
PRBLMSLV	Problem Solving	Quickly identifies problems and gathers and analyzes relevant data in order to develop alternate solutions and resolve problems in a timely manner.			X
PREP	Preparation	Accurately assesses time input required for a task and makes necessary preparations and adjustments to deliver quality results in given time frame.			
PRIOR	Assign Priority	Able to assign priority to multiple engineering emergencies, determining the highest priority based on importance and impact of station being "on the air".			
PRJCMGT	Project Managment	Able to see project through all phases or steps until the very end, plans resources accordingly for best possible outcome.			
PROD	Production Duties	Produces quality promos, spots, programs, and/or features in a timely and efficient manner; good writing skills, appropriate music, effects, and natural sound.			
PROFDEV	Professional Development	Seeks professional development when appropriate and through the appropriate channels. Exhibits working & developing knowledge and skills relevant to the job and current industry standards.			
QNTYWRK	Quantity of Work	Volume of productivity is appropriate to the normal demands of the position. Responds to occasions of increased work demands.	X	X	
QUALEE	Quality of Work	Work is thorough, accurate, and timely, with few errors.	X	X	
RECTRLNT	Recruit & Select Talent	Works with Employment Services to attract and hire quality talent while considering and adhering to organizational standards.			
REGCMPL	Regulation Compliance	Understands and adheres to industry standard regulations impacting Moody, makes adjustments as necessary.			
RND	Research and Development	Able to determine appropriate sources of information in order to thoroughly investigate a topic and report key highlights relevant to current organizational needs.			

RPRMNT	Repair & Maintenance	Responds to equipment failure and/or property needs in a timely and efficient manner. Takes preventative steps to maintain equipment and/or property.			
SALES	Sales	Achieves sales as measured against budget.			
SPCLEVNT	Special Events and Programming	Demonstrates preparation, customer service, enthusiasm, and proper management appropriate to their role during special programs or events offered through the Institute.			
STFDEV	Employee Development	Provides a positive work setting that encourages and enables self-development. Anticipates employee changes and prepares individuals for advancement.			X
STRPLN	Strategic Planning	Sees the big picture, plans and makes decisions with a sustainable future in mind, intentionally aligns goals and decisions with broader organizational goals.			
STUDEV	Student Development	Committed to student development and strives to serve students well while building quality rapport.			
TCHNLGY	Use of Technology	Demonstrates required skills, keeps current with and adapts to new technologies. Leverages technology to increase productivity.	X	X	
TMDEV	Team Leadership	Promotes team goals and participation, defines individual roles and responsibilities, and recognizes individual and team successes.			
TRNS	Transmitter Operations & Responsibilities	Good working knowledge of transmitter controls and readings, EAS responsibilities and procedures.			
TSKLS	Technical Skills & Responsibilities	Skilled at editing and mixing in timely and efficient manner; good working knowledge of audio equipment and related software.			
TWRK	Teamwork/Collaboration	Cooperative and effective team member, willing to collaborate with and help others. Supplies needed information and resources to other employees with overlapping work. Acts as a cooperative contributor in team problem solving.	X	X	
VLTRMGMT	Volunteer Management	Effectively leverages available volunteers to achieve the goal at hand, ensures volunteers feel valuable and respected.			

We are always willing to help with any issues you may encounter, call x4483 for assistance