

# ePerformance Manager's Guide



# ePerformance *Manager Training Guide*

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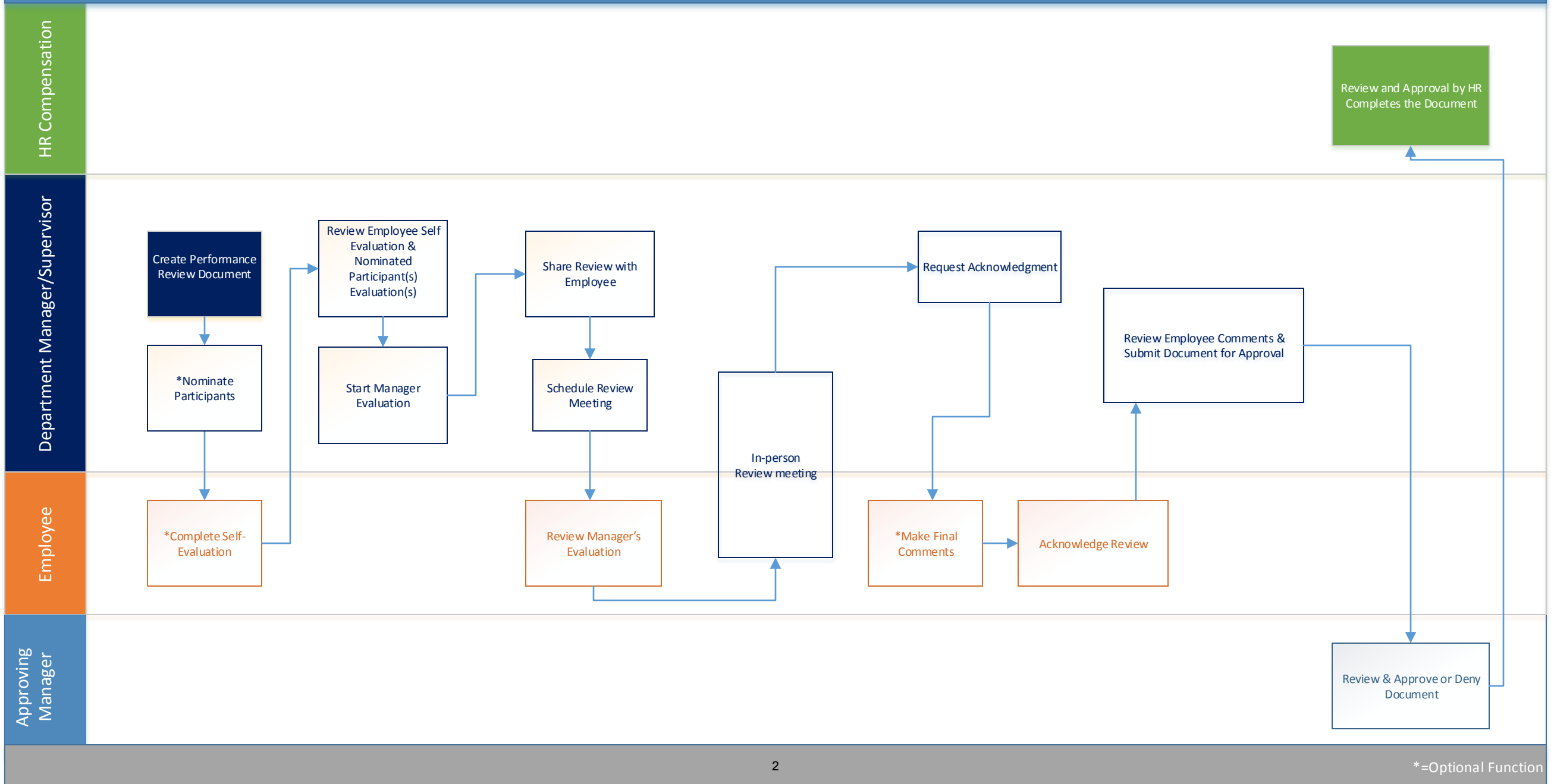
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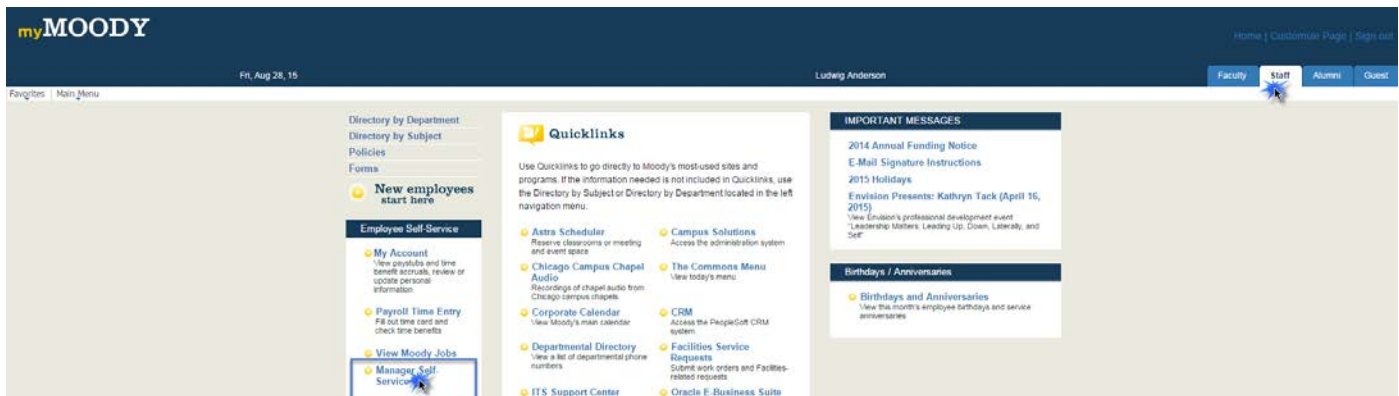
# ePerformance Employee Review Process 2015



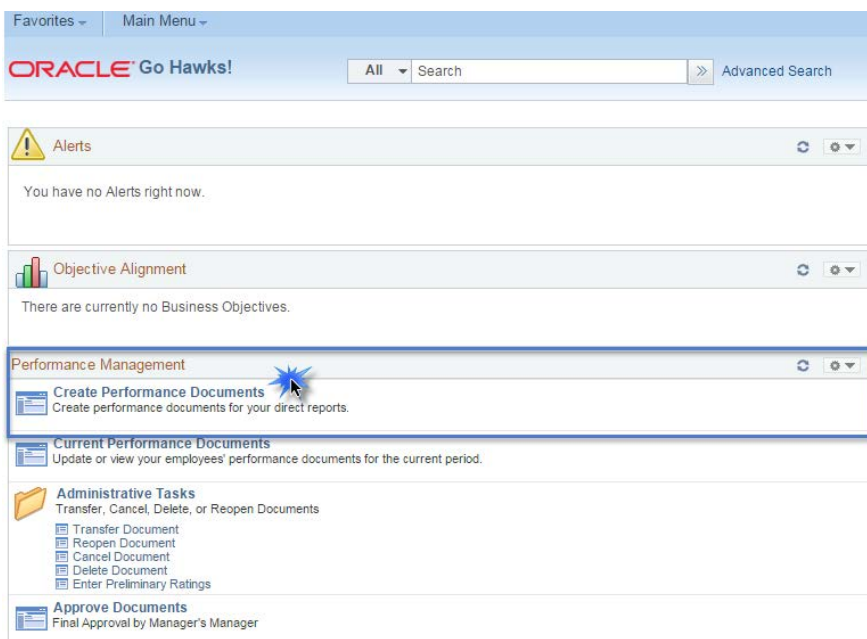
## ePerformance Manager Guide

### 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' is current to guarantee your most recent reporting structure.

## ePerformance Manager Guide

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

ORACLE® All ▾ Search >> Advanced Search

### Create Performance Documents

**Employee Selection Criteria**  
Select the employees you are creating new performance documents for.

As Of Date 04/13/2015 [5]

Select Your Job Department Manager - OPNS ▾

Refresh Employees

Find Employee

Ludwig L. Anderson's employees

Select	Name	Empl ID	HR Status	Job Title	Department
<input checked="" type="checkbox"/>	Ludwig L. Anderson	12345678	Active	HR Department - Training & Development	HR Department
<input type="checkbox"/>	John Doe	87654321	Active	IT Department - Systems Administration	IT Department

Select All Deselect All

Continue

- Also check your period begin and end dates for accuracy before proceeding (7/1 – 6/30 for all Full-time and Part-time Professional employees & 10/1 – 9/30 for Department Managers & 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

ORACLE® All ▾ Search >> Advanced Search

### 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 07/01/2014 [5] Period End Date 06/30/2015 [5]

Document Type Annual Review-October/November ▾

Template Dept Mgr & Above ▾

Create Documents

**Selected Employees**

Employee ID	Last Name	First Name
12345678	Anderson	Ludwig

Return to Select Employees

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

## ePerformance Manager Guide

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

ORACLE® All ▾ Search >> Advanced Search Home | Worklist | Add to New Window |

### 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 07/01/2014 [B] Period End Date 06/30/2015 [B]

Document Type Annual Review-July/June ▾

Template Employee ▾

Create Documents

**Selected Employees**

Employee ID	Last Name	First Name

[Return to Select Employees](#)

8. 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.

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

ORACLE® All ▾ Search >> Advanced Search Last Search Results

### Create Performance Documents - Results

Below is a list of employees you selected for Performance Document Creation and the results of the process. Employees with errors will need to be re-run after correcting the source of the error.

The "Current Documents" hyperlink can be used to access individual performance documents.

**Selected Employees**

Employee ID	Name	Template	Successful Creation?	Status
		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.

## ePerformance Manager Guide

**A performance process has been initiated - Annual Review-October/November; 10/01/2014 - 09/30/2015.**

PeopleSoft@peoplesoft.com

Sent: Wed 8/26/2015 10:58 AM

To: [REDACTED]

This automatic notification is to inform you that the Annual Review-October/November 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 09/11/2015 for your Manager's consideration in their review of your performance.

Navigate to: [http://hcm92te.moody.edu/psp/HCM92TE/EMPLOYEE/HRMS/c/ROLE\\_EMPLOYEE.EP\\_NOTIFY.GBL?EP\\_APPRAISAL\\_ID=1932&EP\\_REVIEWER\\_ID=1465469&EP\\_ROLE=E&EP\\_USER\\_ROLE=E&TRANS\\_NAME=BASELINE-CREATE](http://hcm92te.moody.edu/psp/HCM92TE/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE.EP_NOTIFY.GBL?EP_APPRAISAL_ID=1932&EP_REVIEWER_ID=1465469&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](http://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.

Current Performance Documents

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

Filter Criteria

First Name [ ] Last Name [ ]

Document Type [ ] Document Status [ ]

Period Between [ ] - [ ]

Filter Clear

Performance Documents

Employee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date
[REDACTED]	[REDACTED] <a href="#">[REDACTED]</a>	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

- 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'.



## ePerformance Manager Guide

Performance Process: Annual Review-July/June (07/01/2014 - 06/30/2015)

Steps and Tasks: **Nominating Participants** (Due Date: 05/01/2015), Review Participant Evaluations (Due Date: 05/15/2015), Review Self Evaluation (Due Date: 05/01/2015), Complete Manager Evaluation (Due Date: 06/05/2015)

Manager Evaluation - Update and Share

Job Title: [Redacted], Document Type: [Redacted], Template: [Redacted], Status: [Redacted]

Manager: [Redacted], Period: [Redacted], Document ID: [Redacted], Due Date: [Redacted]

Employee Data: Empl ID 4144372, Department 2210 Human Resources

Section 1 - Mission Statement: Mission 1: Our Mission. Description: Across the globe, cultures, and generations Moody will equip people with the truth of God's Word using new technology in an agile and innovative community.

- If you are nominating your own manager as a participant select 'Add Manager's Manager' otherwise choose 'Add Participating Manager'. You may have your own manager and a maximum of two additional participating managers providing feedback for any one employee review.

Performance Process: Annual Review-July/June (07/01/2014 - 06/30/2015)

Steps and Tasks: **Nominating Participants** (Due Date: 05/01/2015), Review Participant Evaluations (Due Date: 05/15/2015), Review Self Evaluation (Due Date: 05/01/2015), Complete Manager Evaluation (Due Date: 06/05/2015)

Nominating Participants - Add Nominees

Job Title: [Redacted], Document Type: [Redacted], Template: [Redacted], Status: [Redacted]

Manager: [Redacted], Period: [Redacted], Document ID: [Redacted], Due Date: [Redacted]

Participant Role: Manager's Manager. Minimum Required: 0 Maximum Available: 1. Nominations: Currently there are no nominees in your nomination list. Add Manager's Manager

Participant Role: Participating Manager. Minimum Required: 0 Maximum Available: 2. Nominations: Currently there are no nominees in your nomination list. Add Participating Manager

- 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'.



## ePerformance Manager Guide

Performance Process
Steps and Tasks
Annual Review-July/June  
07/01/2014 - 06/30/2015 Overview

- ☒ Nominate Participants  
Due Date 05/01/2015  
Add Nominees  
Track Nominations
- ☐ Review Participant Evaluations  
Due Date 05/15/2015
- ☐ Review Self Evaluation  
Due Date 05/01/2015
- ☒ Complete Manager Evaluation  
Due Date 06/05/2015  
Update and Share  
Request Acknowledgement  
Pending Acknowledgement  
Submit for Approval  
Pending Approval  
Complete

New Window | Help | Persc

### Person Search

Nominate Participants

Instructions

This page allow you to search for, and select people by Name. Enter full or partial name information in the fields below, then select the **Search** button to display a list of people meeting this Name criteria. More information about a listed person can be viewed by selecting the **i** icon that appears next to the person's name.

Search Criteria

Name  
Last Name  
Second Last Name  
First Name  
ACName

Search

Search Results

Return to Previous Page

- 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.

Performance Process
Steps and Tasks
Annual Review-July/June  
07/01/2014 - 06/30/2015 Overview

- ☒ Nominate Participants  
Due Date 05/01/2015  
Add Nominees  
Track Nominations
- ☐ Review Participant Evaluations  
Due Date 05/15/2015
- ☐ Review Self Evaluation  
Due Date 05/01/2015
- ☒ Complete Manager Evaluation  
Due Date 06/05/2015  
Update and Share  
Request Acknowledgement  
Pending Acknowledgement  
Submit for Approval  
Pending Approval  
Complete

Annual Review-July/June
Return to Current Documents Save Submit Nominations Notify

### Nominate Participants - Add Nominees

Actions

Job Title  
Document Type  
Template  
Status

Manager  
Period  
Document ID  
Due Date

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

Participant Role: Manager's Manager Minimum Required: 0 Maximum Available:1  
Nominations  
Currently there are no nominees in your nomination list.  
Add Manager's Manager

Participant Role: Participating Manager Minimum Required: 0 Maximum Available:2  
Nominations  

Nominee	Action

Add Participating Manager

## ePerformance Manager Guide

Performance Process

Steps and Tasks

Annual Review-July/June  
07/01/2014 - 06/30/2015 Overview

Nominate Participants

Due Date 05/01/2015

Add Nominees

Track Nominations

Review Participant Evaluations

Due Date 05/15/2015

Review Self Evaluation

Due Date 05/01/2015

Complete Manager Evaluation

Submit Nominations

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

Confirm

Cancel

Performance Process

Steps and Tasks

Candra Garrett  
Annual Review-July/June  
07/01/2014 - 06/30/2015 Overview

Nominate Participants

Due Date 05/01/2015

Add Nominees

Track Nominations

Review Participant Evaluations

Due Date 05/15/2015

Review Self Evaluation

Due Date 05/01/2015

Annual Review-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.

- 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.

### You have been nominated to participate in a review for [REDACTED]

PeopleSoft@peoplesoft.com

Sent: Wed 8/26/2015 11:04 AM

To: [REDACTED]

This e-mail notification is to inform you that you have been nominated to participate in the review of [REDACTED] for periods: 10/01/2014 - 09/30/2015.

Follow link [http://hcm92te.moody.edu/psp/HCM92TE/EMPLOYEE/HRMS/c/ROLE\\_EMPLOYEE.EP\\_NOTIFY.GBL?EP\\_APPRAISAL\\_ID=1932&EP\\_REVIEWER\\_ID=0545601&EP\\_ROLE=E&EP\\_USER\\_ROLE=O&EP\\_DOC\\_USAGE=P&TRANS\\_NAME=NOM-SUBMIT](http://hcm92te.moody.edu/psp/HCM92TE/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE.EP_NOTIFY.GBL?EP_APPRAISAL_ID=1932&EP_REVIEWER_ID=0545601&EP_ROLE=E&EP_USER_ROLE=O&EP_DOC_USAGE=P&TRANS_NAME=NOM-SUBMIT) to respond to the nomination for your participation.

\*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](http://my.moody.edu)>directory by department) or call x4483 for additional resources.

(Please do not respond to this automatic notification.)

- 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.

## ePerformance Manager Guide

Favorites ▾ | Main Menu ▾ > Manager Self Service ▾ > Performance Management ▾ > Performance Documents ▾ > Current Documents

ORACLE® | All ▾ Search | Advanced Search | Last Search Results

Performance Process | Annual Review-July/June | Return

**Steps and Tasks**

Annual Review-July/June  
 07/01/2014 - 06/30/2015 | Overview

☒ **Nominate Participants**  
 Due Date: 05/01/2015  
 Add Nominees  
 Track Nominations

☐ Review Participant Evaluations  
 Due Date: 05/15/2015

☐ Review Self Evaluation  
 Due Date: 05/01/2015

☒ **Complete Manager Evaluation**  
 Due Date: 06/05/2015  
 Update and Share  
 Request Acknowledgement  
 Pending Acknowledgement  
 Submit for Approval  
 Pending Approval  
 Complete

**Nominate Participants - Track Nominations**

Job Title: [Redacted] | Manager: [Redacted]  
 Document Type: [Redacted] | Period: [Redacted]  
 Template: [Redacted] | Document ID: [Redacted]  
 Status: [Redacted] | Due Date: [Redacted]

Participant Role: Manager's Manager | Minimum Required: 0 | Maximum Available: 1  
 Participant Role: Participating Manager | Minimum Required: 0 | Maximum Available: 1

Nominations		
Nominee	Status	Action
Serene Hudson	Pending	Cancel

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

**A nomination request has been accepted for Annual Review-October/November document for [Redacted]**

PeopleSoft@peoplesoft.com

Sent: Wed 8/26/2015 11:04 AM

To: [Redacted]

This automatic notification is to inform you that a nomination request has been accepted for [Redacted] Annual Review-October/November performance document.

Navigate to: [http://hcm92te.moody.edu/psp/HCM92TE/EMPLOYEE/HRMS/c/ROLE\\_EMPLOYEE.EP\\_NOTIFY.GBL?EP\\_APPRAISAL\\_ID=1932&EP\\_REVIEWER\\_ID=0399013&EP\\_ROLE=M&EP\\_USER\\_ROLE=M&TRANS\\_NAME=NOM-ACCEPT](http://hcm92te.moody.edu/psp/HCM92TE/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE.EP_NOTIFY.GBL?EP_APPRAISAL_ID=1932&EP_REVIEWER_ID=0399013&EP_ROLE=M&EP_USER_ROLE=M&TRANS_NAME=NOM-ACCEPT) to view the 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](http://my.moody.edu) > directory by department) or call x4483 for additional resources.

(Please do not respond to this automatic notification.)

- 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.

## ePerformance Manager Guide

**Nominated participant has completed review of Annual Review-October/November document for [REDACTED]**

PeopleSoft@peoplesoft.com

Sent: Wed 8/26/2015 11:05 AM

To: [REDACTED]

A nominated participant has completed review of Annual Review-October/November document for [REDACTED]

Follow this link [http://hcm92te.moody.edu/psp/HCM92TE/EMPLOYEE/HRMS/c/ROLE\\_EMPLOYEE.EP\\_NOTIFY.GBL?EP\\_APPRAISAL\\_ID=1932&EP\\_REVIEWER\\_ID=0399013&EP\\_ROLE=M&EP\\_USER\\_ROLE=M&TRANS\\_NAME=OTHDOC-COMplete](http://hcm92te.moody.edu/psp/HCM92TE/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE.EP_NOTIFY.GBL?EP_APPRAISAL_ID=1932&EP_REVIEWER_ID=0399013&EP_ROLE=M&EP_USER_ROLE=M&TRANS_NAME=OTHDOC-COMplete) to go directly to your Annual Review-October/November document.\*

\*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](http://my.moody.edu)>directory by department) or call x4483 for additional resources.

(Please do not respond to this automatic notification.)

The screenshot displays the Oracle ePerformance Manager web application. The top navigation bar includes 'Favorites', 'Main Menu', and 'Manager Self Service'. The breadcrumb trail indicates the current location: 'Performance Management > Performance Documents > Current Documents'. The main content area is titled 'Annual Review-July/June' and 'Manager Evaluation - Update and Share'. It features a sidebar with a list of actions, including 'Nominate Participants', 'Review Participant Evaluations' (highlighted), 'Review Self Evaluation', and 'Complete Manager Evaluation'. The main area shows a form for evaluating a manager, with fields for 'Job Title', 'Document Type', 'Template', and 'Status'. Below this, there are sections for 'Employee Data' and 'Other Participants'. The 'Other Participants' section is expanded, showing details for 'Vice President - OPERATIONS'. The bottom of the form includes a 'Description' field and a 'Cancel Evaluation' button.

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

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

## ePerformance Manager Guide

### Employee Self Evaluation Complete - [REDACTED]

PeopleSoft@peoplesoft.com

Sent: Wed 8/26/2015 11:03 AM

To: [REDACTED]

[REDACTED] has completed the Employee Self Evaluation for Annual Review-October/November, 10/01/2014 - 09/30/2015.

Navigate to: [http://hcm92te.moody.edu/psp/HCM92TE/EMPLOYEE/HRMS/c/ROLE\\_EMPLOYEE.EP\\_NOTIFY.GBL?EP\\_APPRAISAL\\_ID=1932&EP\\_REVIEWER\\_ID=0399013&EP\\_ROLE=M&EP\\_USER\\_ROLE=M&TRANS\\_NAME=EMPDOC-COMPLETE](http://hcm92te.moody.edu/psp/HCM92TE/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE.EP_NOTIFY.GBL?EP_APPRAISAL_ID=1932&EP_REVIEWER_ID=0399013&EP_ROLE=M&EP_USER_ROLE=M&TRANS_NAME=EMPDOC-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.)

- 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.

Performance Process <<

Steps and Tasks

Annual Review-July/June  
07/01/2014 - 06/30/2015 Overview

- Nominate Participants  
Due Date 05/01/2015
- Review Participant Evaluations  
Due Date 05/15/2015
- Review Self Evaluation  
Due Date 05/01/2015  
**View**
- Complete Manager Evaluation  
Due Date 06/05/2015
  - Update and Share
  - Request Acknowledgement
  - Pending Acknowledgement
  - Submit for Approval
  - Pending Approval
  - Complete

Annual Review-July/June  
Manager Evaluation - Update and Share

Actions

Job Title [REDACTED]  
Document Type [REDACTED]  
Template [REDACTED]  
Status [REDACTED]

Manager [REDACTED]  
Period [REDACTED]  
Document ID [REDACTED]  
Due Date [REDACTED]

Employee Data

Empl ID [REDACTED]  
Department [REDACTED]

Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.

Expand All | Collapse All | Calculate All Ratings | Cancel Evaluation

Section 1 - Mission Statement

Expand | Collapse

Mission 1: Our Mission

Mission 2: The Values of Moody Bible Institute

Section 2 - Mission Questions


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

## ePerformance Manager Guide

Annual Review-July/June

### Self-Evaluation - Completed

Actions ▾



Job Title	HR Specialist - Training & Development	Manager	John Doe - HR Manager
Document Type	Annual Review - Self-Evaluation	Period	July 2015 - June 2016
Template	Standard	Document ID	12345
Status	Completed	Due Date	06/30/2016

---

Employee Data

Empl ID: 4144372  
Department: 2210 Human Resources

The document status is Completed.

Expand All | Collapse All | Reopen

---

Section 1 - Accomplishments

Expand | Collapse

Accomplishments

---

Section 2 - Employee Goals

Expand | Collapse

Goal 1: Job-related Goals/Objectives

Goal 2: Goals Linked to MBI Strategic Objectives (as applicable)

Goal 3: Personal Development Goals/Objectives

---

Audit History


Created By	John Doe - HR Manager	Created On	06/30/2016
Last Modified By	John Doe - HR Manager	Last Modified On	06/30/2016
Completed By	John Doe - HR Manager	Completed On	06/30/2016

- 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.

Annual Review-July/June

### Self-Evaluation - Completed

Actions ▾



Job Title	HR Specialist - Training & Development	Manager	John Doe - HR Manager
Document Type	Annual Review - Self-Evaluation	Period	July 2015 - June 2016
Template	Standard	Document ID	12345
Status	Completed	Due Date	06/30/2016

---

Employee Data

Empl ID: 4144372  
Department: 2210 Human Resources

The document status is Completed.

Expand All | Collapse All | Reopen

---

Section 1 - Accomplishments

Expand | Collapse

Accomplishments

Description: Progress toward agreed upon goals and objectives for the prior review period. Include measurement criteria and dates where applicable.

Employee Comments

Employee Comments

04/13/2015 2:12PM

Created By: Template

- 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.

Oracle ePerformance Manager - Manager Evaluation - Update and Share

Annual Review-July/June  
07/01/2014 - 06/30/2015

Steps and Tasks:

- Nominate Participants (Due Date: 05/01/2015)
- Review Participant Evaluations (Due Date: 05/15/2015)
- Review Self Evaluation (Due Date: 05/01/2015)
- Complete Manager Evaluation (Due Date: 06/05/2015)
  - Update and Share**
  - Request Acknowledgement
  - Pending Acknowledgement
  - Submit for Approval
  - Pending Approval
  - Complete

Employee Data:

Job Title: [Name], Training & Development  
Document Type: [Name], Review  
Template: [Name], Review  
Status: [Name], Review

Manager: [Name], Review  
Period: [Name], Review  
Document ID: [Name], Review  
Due Date: [Name], Review

Empl ID: [Name], Review  
Department: [Name], Review

You have successfully saved your evaluation.  
Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.

Expand All | Collapse All | Calculate All Ratings | Cancel Evaluation

Section 1 - Mission Statement

Expand | Collapse

Mission 1: Our Mission

Oracle ePerformance Manager - Share with Employee

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

Confirm Cancel

Steps and Tasks:

- Nominate Participants (Due Date: 05/01/2015)
- Review Participant Evaluations (Due Date: 05/15/2015)
- Review Self Evaluation (Due Date: 05/01/2015)
- Complete Manager Evaluation (Due Date: 06/05/2015)
  - Update and Share**
  - Request Acknowledgement
  - Pending Acknowledgement
  - Submit for Approval
  - Pending Approval
  - Complete



## ePerformance Manager Guide

The screenshot shows the Oracle ePerformance Manager interface. At the top, there is a search bar with 'All' selected and a search button. Below this, the 'Performance Process' section shows 'Annual Review-July/June'. The 'Steps and Tasks' section on the left lists several tasks: 'Nominate Participants' (Due Date: 05/01/2015), 'Review Participant Evaluations' (Due Date: 05/15/2015), 'Review Self Evaluation' (Due Date: 05/01/2015, marked with a green checkmark), and 'Complete Manager Evaluation' (Due Date: 06/05/2015). Under 'Complete Manager Evaluation', the 'Update and Share' task is highlighted in yellow. The main content area shows a confirmation message: 'Confirmation - Shared with Employee' with a green checkmark icon. Below this, a green box contains the text: '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 be able to view it.

### Your manager has shared Annual Review-October/November, 10/01/2014 - 09/30/2015 with you

PeopleSoft@peoplesoft.com

Sent: Wed 8/26/2015 11:08 AM

To: [Redacted]

This automatic notification is to alert you that your manager has shared Annual Review-October/November 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 10/02/2015.

Follow this link [http://hcm92te.moody.edu/psp/HCM92TE/EMPLOYEE/HRMS/c/ROLE\\_EMPLOYEE.EP\\_NOTIFY.GBL?EP\\_APPRAISAL\\_ID=1932&EP\\_REVIEWER\\_ID=1465469&EP\\_ROLE=M&EP\\_USER\\_ROLE=E&TRANS\\_NAME=RQST-REVIEW](http://hcm92te.moody.edu/psp/HCM92TE/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE.EP_NOTIFY.GBL?EP_APPRAISAL_ID=1932&EP_REVIEWER_ID=1465469&EP_ROLE=M&EP_USER_ROLE=E&TRANS_NAME=RQST-REVIEW) to go directly to your prepared Annual Review-October/November.\*

\*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](http://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 your in-person review meeting and the review is completed and shared it's time to request acknowledgement from the employee. This provides your employee the opportunity to offer their final comments and to acknowledge or "sign" the finalized review prior to approval.
5. From your current document list, select the review document for which you are requesting acknowledgement.\*  
\*Note: You must first share the document with the employee before you can request acknowledgement, check the 'document status' column to ensure this has been done first.

## ePerformance Manager Guide

[Favorites](#) > [Main Menu](#) > [Manager Self Service](#) > [Performance Management](#) > [Performance Documents](#) > [Current Documents](#)



**ORACLE**


### Current Performance Documents

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

Filter Criteria

Performance Documents

Personalize | Find |  |  | First 1 of 1 Last

Employee ID	Name	Document Type▼	Document Status	Period Begin	Period End	Job Title	Next Due Date
		Annual Review-July/June	Shared with Employee 	07/01/2014	06/30/2015		06/05/2015

6. Select 'Request Acknowledgement' in the top right hand corner of the review. Then select 'confirm'. Look for green check mark confirming success.

[Favorites](#) > [Main Menu](#) > [Manager Self Service](#) > [Performance Management](#) > [Performance Documents](#) > [Current Documents](#)

**ORACLE**

[Home](#) | [Worklist](#) | [Add to Favorites](#) | [Sign out](#)

**Performance Process**

**Steps and Tasks**

Annual Review-July/June  
 07/01/2014 - 06/30/2015 [Overview](#)

- ☐ Nominate Participants  
Due Date: 05/01/2015
- ☐ Review Participant Evaluations  
Due Date: 05/15/2015
- ☒ Review Self Evaluation  
Due Date: 05/01/2015
- ☒ Complete Manager Evaluation  
Due Date: 06/05/2015
  - ☒ Update and Share
  - ☐ Request Acknowledgement
  - ☐ Pending Acknowledgement
  - ☐ Submit for Approval
  - ☐ Pending Approval
  - ☐ Complete

**Annual Review-July/June** [Return to Current Documents](#)

**Manager Evaluation - Request Acknowledgement** [Print](#) | [Notify](#) | [Export](#)

**Actions**

**Job Title**   
**Document Type**   
**Template**   
**Status**

**Manager**   
**Period**   
**Document ID**   
**Due Date**

**Employee Data**

**Empl ID**   
**Department**

This document is currently shared with the employee. After you have completed your discussion with the employee select the Request Acknowledgement button to notify the employee that this document is ready for their acknowledgement.

|  |

**Section 1 - Mission Statement**  
 |

**Mission 1: Our Mission**

## ePerformance Manager Guide

Favorites ▾ Main Menu ▾ > Manager Self Service ▾ > Performance Management ▾ > Performance Documents ▾ > Current Documents

ORACLE® All ▾ Search >> Advanced Search

Performance Process ⚙️ ⏪

Steps and Tasks ⌂ ⚙️ ▾

Annual Review-July/June  
07/01/2014 - 06/30/2015 Overview

- Nominate Participants  
Due Date 05/01/2015
- Review Participant Evaluations  
Due Date 05/15/2015
- Review Self Evaluation  
Due Date 05/01/2015
- Complete Manager Evaluation  
Due Date 06/05/2015
  - Update and Share
  - Request Acknowledgement
  - Pending Acknowledgement
  - Submit for Approval
  - Pending Approval
  - Complete

**Request Acknowledgement**

Select confirm to send a request to the employee asking them to acknowledge that they have read and discussed this document with you.

Confirm Cancel

Favorites ▾ Main Menu ▾ > Manager Self Service ▾ > Performance Management ▾ > Performance Documents ▾ > Current Documents

ORACLE® All ▾ Search >> Advanced Search

Performance Process ⚙️ ⏪

Steps and Tasks ⌂ ⚙️ ▾

Annual Review-July/June  
07/01/2014 - 06/30/2015 Overview

- Nominate Participants  
Due Date 05/01/2015
- Review Participant Evaluations  
Due Date 05/15/2015

Annual Review-July/June  
**Confirmation - Acknowledgement Requested** ✓

✓ You have successfully requested that the employee acknowledge this document.

7. Your employee will get a notification (similar to below) that you have requested acknowledgement from them and that they can provide comments before acknowledging the document.

### Your final Annual Review-October/November document is ready for your final comments & acknowledgement

PeopleSoft@peoplesoft.com

Sent: Wed 8/26/2015 11:11 AM

To: [REDACTED]

This email notification is to inform you that your Annual Review-October/November document is ready for your final comments and acknowledgement. If you have no new comments as a result of the in-person review meeting you may go ahead and acknowledge the review without comment.

Your acknowledgement serves as your "signature" on the final review document. However, please note your acknowledgement does not necessarily mean agreement, but affirms that this review was held and was discussed in detail with you.

Follow this link [http://hcm92te.moody.edu/psp/HCM92TE/EMPLOYEE/HRMS/c/ROLE\\_EMPLOYEE.EP\\_NOTIFY.GBL?EP\\_APPRAISAL\\_ID=1932&EP\\_REVIEWER\\_ID=1465469&EP\\_ROLE=M&EP\\_USER\\_ROLE=E&TRANS\\_NAME=RQST-ACKNOWLEDGE](http://hcm92te.moody.edu/psp/HCM92TE/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE.EP_NOTIFY.GBL?EP_APPRAISAL_ID=1932&EP_REVIEWER_ID=1465469&EP_ROLE=M&EP_USER_ROLE=E&TRANS_NAME=RQST-ACKNOWLEDGE) to go directly to your Annual Review-October/November document\*

\*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](http://my.moody.edu) > directory by department) or call x4483 for additional resources.

(Please do not respond to this automatic notification.)

## 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.

**[REDACTED] has acknowledged the final Annual Review-October/November document**

PeopleSoft@peoplesoft.com  
 Sent: Wed 8/26/2015 11:12 AM  
 To: [REDACTED]

---

This automatic notification is to alert you that [REDACTED] has formally acknowledged the final Annual Review-October/November review document. Submit this document for approval by your Manager by 10/02/2015.

Navigate to: [http://hcm92te.moody.edu/psp/HCM92TE/EMPLOYEE/HRMS/c/ROLE\\_EMPLOYEE.EP\\_NOTIFY.GBL?EP\\_APPRAISAL\\_ID=1932&EP\\_REVIEWER\\_ID=0399013&EP\\_ROLE=M&EP\\_USER\\_ROLE=M&TRANS\\_NAME=EE-ACKNOWLEDGE](http://hcm92te.moody.edu/psp/HCM92TE/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE.EP_NOTIFY.GBL?EP_APPRAISAL_ID=1932&EP_REVIEWER_ID=0399013&EP_ROLE=M&EP_USER_ROLE=M&TRANS_NAME=EE-ACKNOWLEDGE) 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.

Employee Comments: Thank you for this thorough review - I appreciate your leadership and the gift of working at Moody.

(Please do not respond to this automatic notification.)

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.

Oracle ePerformance Manager interface showing the 'Manager Evaluation - Submit' document. The interface includes a top navigation bar with 'Favorites', 'Main Menu', and 'Manager Self Service'. The left sidebar shows 'Performance Process' with steps like 'Nominate Participants', 'Review Participant Evaluations', 'Review Self Evaluation', and 'Complete Manager Evaluation'. The main content area displays 'Annual Review-July/June' and 'Manager Evaluation - Submit'. It includes a 'Goal 3: Personal Development Goals/Objectives' section with a description and a 'Manager Comments' text box containing 'Overall you did an A+ job this year.' Below this is 'Section 12 - Employee Comments' with an empty 'Employee Comments' text box. In the top right corner, there is a 'Submit for Approval' button highlighted with a blue starburst.

## ePerformance Manager Guide

- 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).

Oracle ePerformance Manager interface showing the 'Submit for Approval' step in the 'Annual Review-July/June' process.

**Performance Process:** Annual Review-July/June (07/01/2014 - 06/30/2015)

**Steps and Tasks:**

- Nominate Participants (Due Date: 05/01/2015)
- Review Participant Evaluations (Due Date: 05/15/2015)
- Review Self Evaluation (Due Date: 05/01/2015)
- Complete Manager Evaluation (Due Date: 06/05/2015)**
  - Update and Share
  - Request Acknowledgement
  - Pending Acknowledgement
  - Submit for Approval**

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

**Data:**

Job Title	Department	Supervisor Name	Company
<input checked="" type="radio"/> Department Manager - OPNS	Learning & Development	Deborah Zelinski	Moody Bible Institute
<input type="radio"/> PT Faculty Adjunct	Undergraduate School	Larry J. Davidhizar	Moody Bible Institute

**Buttons:** Confirm, Cancel

Oracle ePerformance Manager interface showing the 'Confirmation - Approval Submitted' screen.

**Performance Process:** Annual Review-July/June (07/01/2014 - 06/30/2015)

**Steps and Tasks:**

- Nominate Participants (Due Date: 05/01/2015)
- Review Participant Evaluations (Due Date: 05/15/2015)
- Review Self Evaluation (Due Date: 05/01/2015)
- Complete Manager Evaluation (Due Date: 06/05/2015)**

**Confirmation - Approval Submitted** ✓

✓ You have successfully submitted this document for approval.

### Request submitted for approval

Candra Garrett

Sent: Wed 8/26/2015 11:13 AM

To: Candra Garrett

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: [REDACTED]

Employee Name: [REDACTED]

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=1932](http://hcm92te.moody.edu/psp/HCM92TE/EMPLOYEE/HRMS/c/ROLE_MANAGER.EP_APPRAISAL_STAT.GBL?Page=EP_APPRAISAL_EE&Action=U&EP_APPRAISAL_ID=1932)

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

## ePerformance Manager Guide

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

Favorites ▾ Main Menu ▾ > Manager Self Service ▾ > Performance Management ▾ > View Approval Status

ORACLE™

All ▾ Search [ ] Advanced Search [ ]

### View Approval Status Detail

Review the status of each transaction request.

Employee Name: [ ] Empl ID: [ ]

Performance Document

Doc Type

Author [ ]

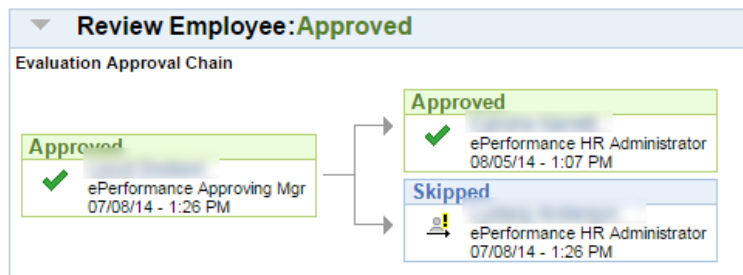
Period Begin Date 09/01/2013

Period End Date 06/30/2014

Rating

[Performance Document Details](#)

### Evaluation Approval Chain



[Approval Summary](#)

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.

From: [ ]  
To: [ ]  
Cc: [ ]  
Subject: Request processed by approver

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=1932](hcm92te.moody.edu/psp/HCM92TE/EMPLOYEE/HRMS/c/ROLE_MANAGER.EP_APPRAISAL_STAT.GBL?Page=EP_APPRAISAL_EE&Action=U&EP_APPRAISAL_ID=1932)

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

## 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.

### Request processed by approver

Sent: Tue 4/14/2015 9:03 AM

To: [REDACTED]

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

The request has been approved by [REDACTED]



Employee Id: [REDACTED]

Employee Name: [REDACTED]

Transaction: Performance Document

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

[https://hcm.moody.edu/psp/HCM92PD/EMPLOYEE/HRMS/c/ROLE\\_MANAGER.EP\\_APPRAISAL\\_STAT.GBL?Page=EP\\_APPRAISAL\\_EE&Action=U&EP\\_APPRAISAL\\_ID=1438](https://hcm.moody.edu/psp/HCM92PD/EMPLOYEE/HRMS/c/ROLE_MANAGER.EP_APPRAISAL_STAT.GBL?Page=EP_APPRAISAL_EE&Action=U&EP_APPRAISAL_ID=1438)

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

- 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.

The following request has been submitted by [REDACTED]. This request requires your approval before the performance document can be finalized.

Submitted Request

Employee Id: [REDACTED]

Employee Name: [REDACTED]

Transaction: Performance Document

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

[https://hcm.moody.edu/psp/HCM92PD/EMPLOYEE/HRMS/c/ROLE\\_MANAGER.EP\\_APPRAISAL\\_XFR.GBL?Page=EP\\_APPRAISAL\\_XFR&Action=U&EP\\_APPRAISAL\\_ID=1435](https://hcm.moody.edu/psp/HCM92PD/EMPLOYEE/HRMS/c/ROLE_MANAGER.EP_APPRAISAL_XFR.GBL?Page=EP_APPRAISAL_XFR&Action=U&EP_APPRAISAL_ID=1435)

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

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



## ePerformance Manager Guide

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

ORACLE® All ▾ Search [ ] >> Advanced Search

### Select Transaction to Approve

The hyperlinks below 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

Filter Criteria

Performance Document							Personalize   Find   [ ] [ ]	First 1 of 1 Last
Name	Begin Date	End Date	Document Status	Approval Status	Submitted By	Document Type		
<a href="#">[Redacted]</a>	07/01/2014	06/30/2015	Approval	Submitted	[Redacted]	Annual Review-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 blue hyperlink at the bottom titled 'Return to Performance Document Approval'.

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

ORACLE® All ▾ Search [ ] >> Advanced Search

### Approve Document

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

Employee Name [Redacted] Empl ID [Redacted]

Actions ▾

Performance Document

Doc Type Annual Review-July/June

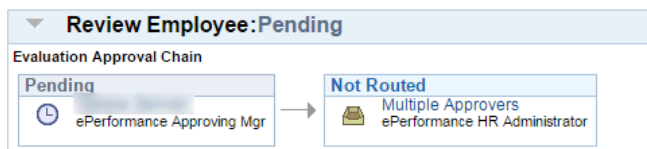
Author [Redacted]

Period Begin Date 07/01/2014 Period End Date 06/30/2015

Rating

[Performance Document Details](#)

### Evaluation Approval Chain



Comment [ ]

Approve Deny

Go To [Approval Summary](#)

## ePerformance Manager Guide

### Section 12 - Employee Comments

Employee Comments

Attachments

File Name	Description	Attachment Audience	Last Update Date/Time	Uploaded By
Innovation.pdf	Innovation	Employee and Manager	04/13/2015 2:33:00PM	

Audit History

Created By		
Last Modified By		
Manager Signed By		
Acknowledged By		

Return to Performance Document Approval

- 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.

### Approve Document

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

Employee Name

Empl ID

Actions

Performance Document

Doc Type

Annual Review-July/June

Author

Period Begin Date

07/01/2014

Period End Date

06/30/2015

Rating

Performance Document Details

### Evaluation Approval Chain

Review Employee: Pending

Evaluation Approval Chain

Pending

⌚ ePerformance Approving Mgr

→

Not Routed

📁 Multiple Approvers  
ePerformance HR Administrator

Comment

Very well done

Approve

Deny

Approval Summary

- 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.

Close

### Request processed by approver

Sent: Tue 4/14/2015 9:02 AM

To: [REDACTED]

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

The request has been approved by [REDACTED]

Employee Id: [REDACTED]

Employee Name: [REDACTED]

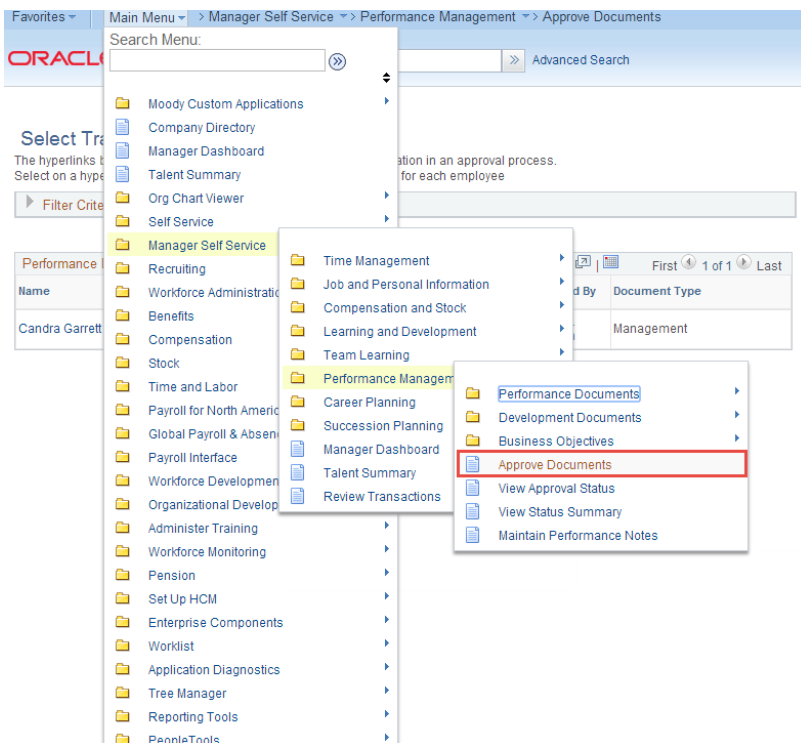
Transaction: Performance Document

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

[https://hcm.moody.edu/psp/HCM92PD/EMPLOYEE/HRMS/c/ROLE\\_MANAGER.EP\\_APPRAISAL\\_STAT.GBL?Page=EP\\_APPRAISAL\\_EE&Action=U&EP\\_APPRAISAL\\_ID=1438](https://hcm.moody.edu/psp/HCM92PD/EMPLOYEE/HRMS/c/ROLE_MANAGER.EP_APPRAISAL_STAT.GBL?Page=EP_APPRAISAL_EE&Action=U&EP_APPRAISAL_ID=1438)

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

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.

Oracle ePerformance Manager interface showing the 'Manager Evaluation - Request Acknowledgement' page. The left sidebar lists steps: Nominate Participants, Review Participant Evaluations, Review Self Evaluation, Complete Manager Evaluation, Update and Share, and Request Acknowledgement (highlighted). The main content area shows employee details (Empl ID, Department) and a 'Reopen' button with a blue star icon.

Oracle ePerformance Manager interface showing the 'Reopen Evaluation' confirmation dialog. The dialog text reads: 'You have chosen to reopen this document. Select confirm to have the document status set back to Evaluation In Progress.' The 'Confirm' button is highlighted with a blue star icon.

Oracle ePerformance Manager interface showing the 'Confirmation - Reopen Evaluation' page. A green checkmark icon is visible next to the title. The message states: 'You have successfully reopened this document and changed the status back to Evaluation In Progress.'

2. **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

## ePerformance Manager Guide

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.

Oracle ePerformance Manager interface showing the 'Manager Evaluation - Update and Share' page. The page includes a sidebar with 'Steps and Tasks' (Nominate Participants, Review Participant Evaluations, Review Self Evaluation, Complete Manager Evaluation, Update and Share), a main content area with 'Section 3 - Employee Goals' and 'Section 4 - Employee Comments', an 'Attachments' table, and an 'Audit History' section. The 'Attachments' table lists files like 'Geeeeraff.jpg', 'ePerformance\_14.15\_Daily\_Message.docx', 'Ticket\_Tracker\_CMG.xlsx', and 'ePerformance\_Doc\_Submission\_Error\_Guide.pdf' with columns for File Name, Description, Attachment Audience, Last Update Date/Time, and Uploaded By. A red box highlights the trash can icons for deleting attachments. A blue star icon is next to the 'Add Attachment' button.

Windows File Explorer window showing the 'ePerformance Guides' folder. The file list includes 'ePerformance Management Review - Managers Guide', 'ePerformance Management Review - Employee Guide', 'Helpful Tips - ePerformance April 2015', 'ePerformance Manager's Guide August 2015', 'ePerformance Employee Guide August 2015', 'ePerformance Employee Guide Front Page', 'Table of Contents - ePerformance Manager's Guide April 2015', 'ePerformance Manager's Guide Front Page', 'ePerformance Process August 2015 PDF', 'ePerformance Employee Training Guide w. Front Page P...', 'ePerformance Manager's Guide w. Front Page PDF 2015', and 'ePerformance Manager Training Guide Full PDF 2015'. A yellow callout '1' points to the 'File Attachment' dialog box, which has 'Choose File' and 'Upload' buttons. A yellow callout '2' points to the 'ePerformance Employee Guide Front Page' file in the File Explorer. A yellow callout '3' points to the 'Open' button in the File Explorer. The 'Attachments' table is visible at the bottom of the screenshot.

## ePerformance Manager Guide

Attachments				
File Name	Description	Attachment Audience	Last Update Date/Time	Uploaded By
ePerformance_Manager_s_Guide_August_2015.pdf			08/28/2015 11:39:13AM	
Geeeeraff.jpg	pic	Manager Only	08/25/2015 11:43:02AM	
ePerformance_14.15_Daily_Message.docx	word	Employee and Mana	08/25/2015 11:43:02AM	
Ticket_Tracker_CMG.xlsx	excel	Employee and Mana	08/25/2015 11:43:02AM	
ePerformance_Doc_Submission_Error_Guide.pdf	PDF	Employee and Mana	08/25/2015 11:43:02AM	

+ Add Attachment

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.

Navigation path: Main Menu > Manager Self Service > Performance Management > Performance Documents > Administrative Tasks > Cancel Document

Search Menu: [Search] Advanced Search Last Search Results

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: 4052511

Select All Continue

Navigation path: Main Menu > Manager Self Service > Performance Management > Performance Documents > Administrative Tasks > Cancel Document

ORACLE

All Search Advanced Search Last Search Results

### 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
4052511		Annual Review-July/June	Evaluation in Progress	07/01/2014	06/30/2015	PT Training Assistant

Select All Deselect All

Continue



## ePerformance Manager Guide

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

ORACLE® All ▾ Search >> Advanced Search Last Search Results

Cancel Document

### Confirm Cancellation

Performance Documents			Personalize   Find      First 1 of 1 Last			
Employee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title
		Annual Review-July/June	Evaluation in Progress	07/01/2014	06/30/2015	PT Training Assistant

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

**Save** Return to Previous Page

(You can also cancel the document right on the main document page as seen in the pictures below.)

Favorites ▾ Main Menu ▾ > Manager Self Service ▾ > Performance Management ▾ > Performance Documents ▾ > Current Documents

ORACLE® All ▾ Search >> Advanced Search Last Search Results

Home | Worklist | Add to Favorites | Sign out

Performance Process << Annual Review-July/June Return to Current Documents **Save** | Share with Employee

Steps and Tasks Manager Evaluation - Update and Share

Annual Review-July/June  
01/01/2015 - 06/30/2015 Overview

- ☐ Nominate Participants  
Due Date 05/01/2015
- ☐ Review Participant Evaluations  
Due Date 05/15/2015
- ☒ Review Self Evaluation  
Due Date 05/01/2015
- ☒ Complete Manager Evaluation  
Due Date 06/05/2015
  - Update and Share**
  - Request Acknowledgement
  - Pending Acknowledgement
  - Submit for Approval
  - Pending Approval

Actions ▾

Job Title PT Training Assistant  
Document Type Annual Review-July/June  
Template  
Status Evaluation in Progress

Manager  
Period  
Document ID  
Due Date

Employee Data

Empl ID  
Department

Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.

Section 1 - Mission Statement

Favorites ▾ Main Menu ▾ > Manager Self Service ▾ > Performance Management ▾ > Performance Documents ▾ > Current Documents

ORACLE® All ▾ Search >> Advanced Search Last Search Results

Performance Process << Cancel Evaluation

Steps and Tasks Are you sure you want to cancel this evaluation? If so, select the Yes push button. If you do not wish to cancel this evaluation, select the No push button.

Candra Garrett  
Annual Review-July/June  
01/01/2015 - 06/30/2015 Overview

- ☐ Nominate Participants  
Due Date 05/01/2015



## ePerformance Manager Guide

Oracle ePerformance Manager interface showing the 'Confirmation - Cancel Document' page. The breadcrumb trail is: Favorites > Main Menu > Manager Self Service > Performance Management > Performance Documents > Current Documents. The page title is 'Annual Review-July/June' and the subtitle is 'Confirmation - Cancel Document'. A green checkmark icon is present. A message states: 'You have successfully canceled the selected evaluation.' The left sidebar shows the 'Steps and Tasks' for 'Candra Garrett' (Annual Review-July/June, 01/01/2015 - 06/30/2015). The tasks listed are: 'Nominate Participants' (Due Date: 05/01/2015), 'Review Participant Evaluations' (Due Date: 05/15/2015), 'Review Self Evaluation' (Due Date: 05/01/2015), and 'Complete Manager Evaluation'.

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'.

Oracle ePerformance Manager interface showing the 'Delete Document' option in the 'Administrative Tasks' menu. The breadcrumb trail is: Favorites > Main Menu > Manager Self Service > Performance Management > Performance Documents > Current Documents. The 'Administrative Tasks' menu is open, showing options: 'Create Documents', 'Create Documents By Group', 'Current Documents', 'Historical Documents', 'View-Only Documents', 'Transfer Document', 'Reopen Document', 'Cancel Document', 'Delete Document', and 'Enter Preliminary Ratings'. The 'Delete Document' option is highlighted.

Oracle ePerformance Manager interface showing the 'Delete Document' page. The breadcrumb trail is: Favorites > Main Menu > Manager Self Service > Performance Management > Performance Documents > Administrative Tasks > Delete Document. The page title is 'Delete Document'. The left sidebar shows 'Filter Criteria'. The right sidebar shows 'Home', 'Worklist', and 'Add to Favorites'. The bottom right corner shows 'New Window | Pers'.

### 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.

Oracle ePerformance Manager interface showing the 'Performance Documents' table. The table has columns: Employee ID, Name, Document Type, Document Status, Period Begin, Period End, and Job Title. The table contains one row with the following data: Employee ID (redacted), Name (redacted), Document Type: Annual Review-July/June, Document Status: Canceled, Period Begin: 03/01/2015, Period End: 06/30/2015, Job Title: PT Training Assistant. The table is titled 'Performance Documents' and has a 'Personalize' button. The table is paginated, showing 'First 1 of 1 Last'. Below the table, there are buttons for 'Select All', 'Deselect All', and 'Continue'.

## ePerformance Manager Guide

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

ORACLE All Search Advanced Search Last Search Results

### Delete Documents

#### Confirm Delete

Performance Documents						
			Personalize   Find		First 1 of 1 Last	
Employee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title
		Annual Review-July/June	Canceled	03/01/2015	06/30/2015	PT Training Assistant

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.

Favorites ▾ Main Menu ▾

ORACLE Search Menu: Search Advanced Search


Menu Search:

- My Favorites
- Moody Custom Self Service
- Manager Self Service
  - Recruiting
  - Workforce Administration
  - Benefits
  - Compensation
  - Stock
  - Time and Labor
  - Payroll for North America
  - Global Payroll & Absence
  - Payroll Interface
  - Workforce Development
  - Organizational Development
  - Administer Training
  - Workforce Monitoring
  - Pension
  - Set Up HCM
- Performance Management
  - Time Management
  - Job and Personal Information
  - Compensation and Stock
  - Learning and Development
  - Team Learning
  - Performance Documents
    - Performance Documents
    - Development Documents
    - Business Objectives
    - Approve Documents
    - View Approval Status
    - View Status Summary
    - Maintain Performance Notes
  - Career Planning
  - Succession Planning
  - Manager Dashboard
  - Talent Summary
  - Review Transactions

## ePerformance Manager Guide

Favorites ▾ Main Menu ▾ > Manager Self Service ▾ > Performance Management ▾ > View Approval Status

ORACLE®

All ▾ Search  >> Advanced Search  Last Search Results


### 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  Last Name

Manager First Name  Last Name

Document Type   Approval Status

Period Between   -  

Performance Document							Personalize   Find      	First  1-3 of 3  Last
Name	Begin Date	End Date	Document Status	Approval Status	Submitted By	Document Type		
<a href="#">Performance Document</a>	09/01/2013	06/30/2014	Completed	Approved				
<a href="#">Performance Document</a>	07/01/2014	06/30/2015	Approval	Submitted		Annual Review-July/June		

Favorites ▾ Main Menu ▾ > Manager Self Service ▾ > Performance Management ▾ > View Approval Status

ORACLE®

All ▾ Search  >> Advanced Search


### View Approval Status Detail

Review the status of each transaction request.

 Empl ID 0033914

Performance Document

Doc Type Annual Review-October/November

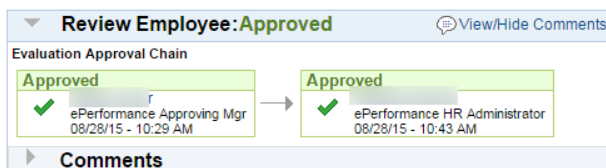
Author 

Period Begin Date 10/01/2014 Period End Date 09/30/2015

Rating

[Performance Document Details](#)

### Evaluation Approval Chain



[Approval Summary](#)

## ePerformance Helpful Tips & Tricks:

### Operating System:

Generally speaking, PC computers are best when working with the ePerformance system so it is recommended you perform your reviews on a PC computer if possible.

### Internet Browser:

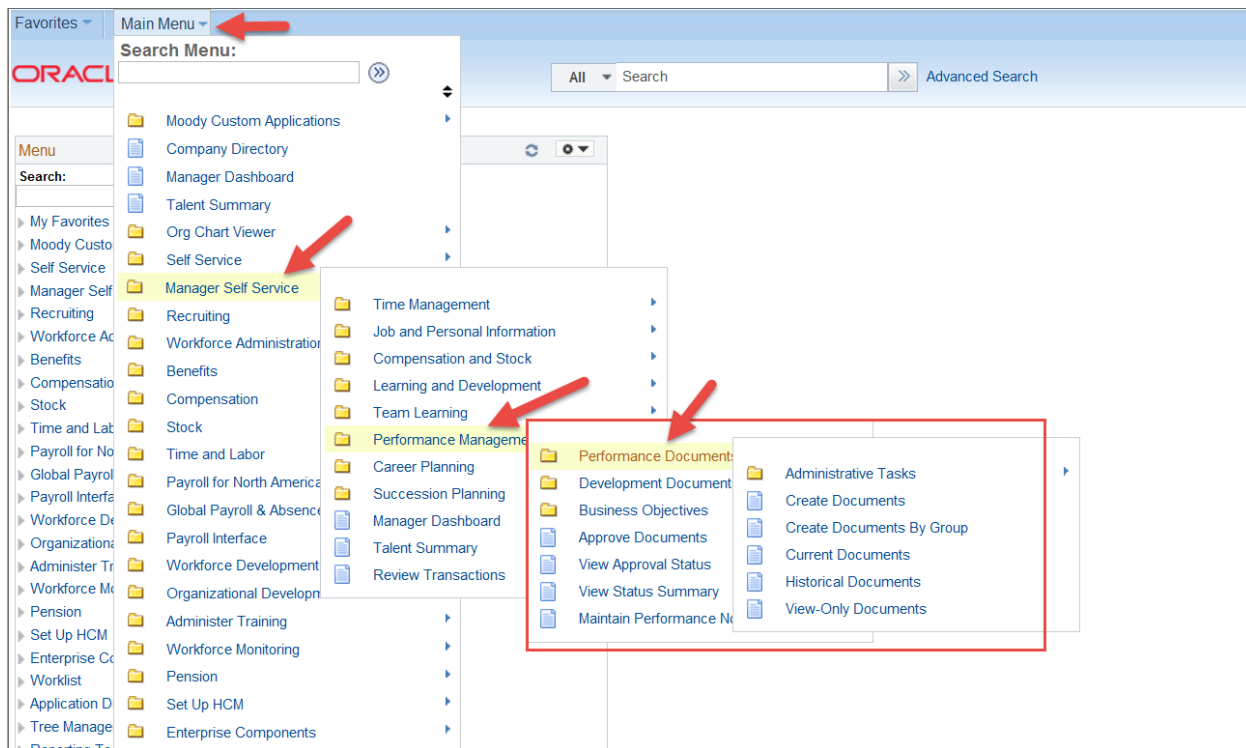
Internet Explorer or Google Chrome is usually best when working with ePerformance. However, you may find that other browsers work for you also. Not all browsers work the same so if you encounter an error it's recommended to attempt the same function again in another browser. Additionally, in any browser that you use be sure to disable pop-up blockers that could potentially thwart your efforts to open a new tab or window. If you still encounter an error contact x4483 for help.

### Activating E-mail Notification Links from ePerformance:

You will receive many e-mails with useful links that can take you directly where you need to go; however, these work best when pop-up blockers are disabled; feel free to call the ITS Support Center (x4067) if you need any help with this. Also, when you select a link it may require you to login first; you will need your MyMoody credentials to do so. As a last resort you can copy and paste the link directly into the browser. However, if you are still experiencing errors accessing the information contact x4483 for help.

### Navigation:

Once you are in the system it's really easy to navigate to the destination you need to go to for ePerformance functions. Everything you will need to do during a performance review can be found in the areas located within the red box and you get there by following the red arrows.



You can also move from one menu item to another with ease using the menu path at the top of your page.

The screenshot shows the Oracle Manager Self Service interface. At the top, the breadcrumb navigation path is: Favorites > Main Menu > Manager Self Service > Performance Management > Performance Documents > Current Documents. A red arrow points to the 'Performance Documents' menu item, which has opened a dropdown menu. The dropdown menu contains the following items: Administrative Tasks, Create Documents, Create Documents By Group, Current Documents, Historical Documents, and View-Only Documents. Below the menu, the 'Current Performance Documents' section is visible, showing a table of performance documents for Candra Garrett.

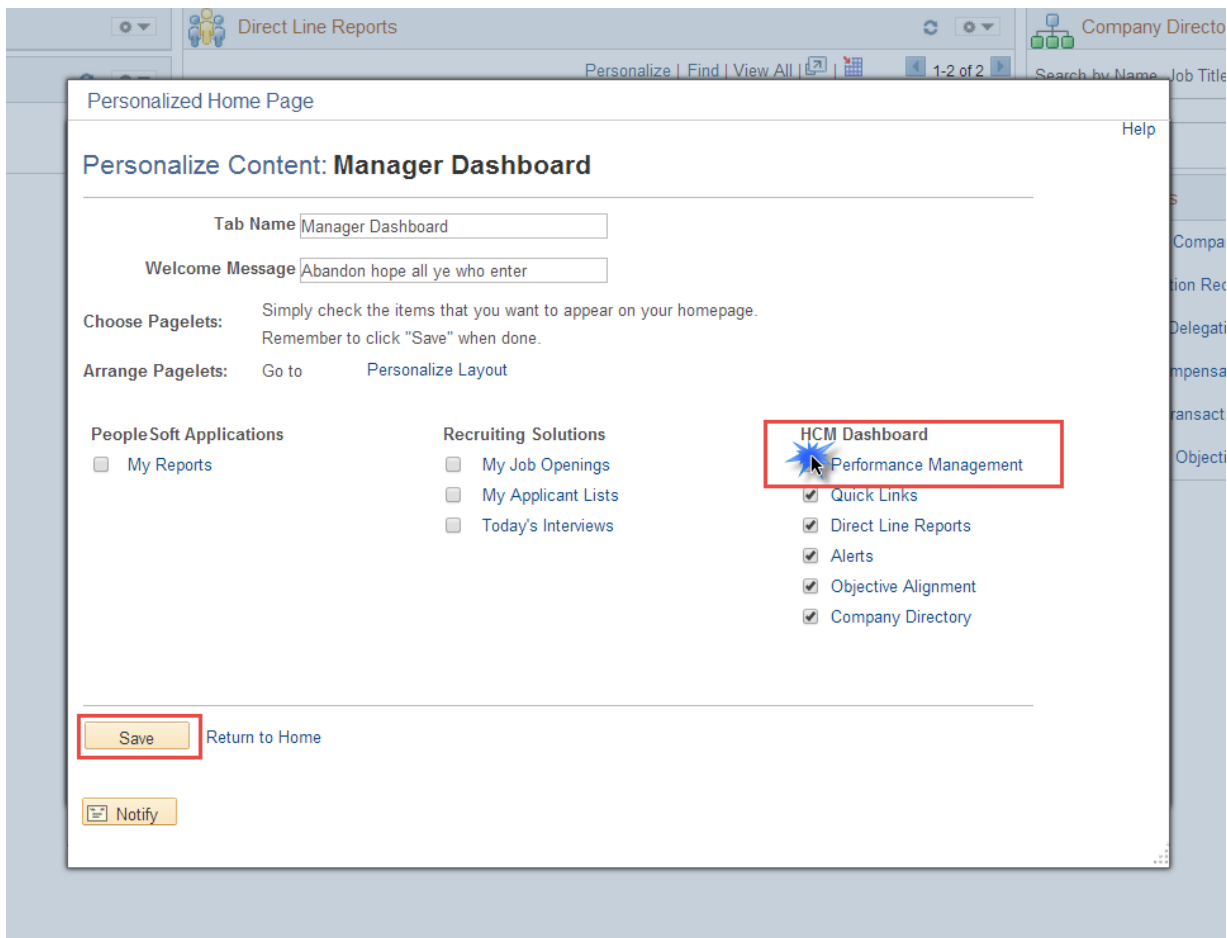
Employee ID	Employee	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date
4144372	Candra Garrett	Annual Review-July/June	Approval - Not Submit	07/01/2016	07/04/2016	HR Generalist: Training & Comp	07/04/2016
4144372	Candra Garrett	Annual Review-July/June	Approval - Not Submit	07/01/2015	07/31/2015	HR Generalist: Training & Comp	07/31/2015
4144372	Candra Garrett	Management	Approval - Not Submit	07/01/2014	07/31/2014	HR Generalist: Training & Comp	08/01/2014
4144372	Candra Garrett	Management	Approval - Submitted	10/01/2013	09/30/2014	HR Generalist: Training & Comp	10/01/2014

### Manager Dashboard in MyMoody:

If you do not see a performance management menu option in your manager dashboard on MyMoody you should be able to add it by personalizing your content.

The screenshot shows the Oracle Manager Dashboard. At the top, the breadcrumb navigation path is: Favorites > Main Menu > Manager Self Service > Performance Management > Performance Documents > Current Documents. A red box highlights the 'Personalize Content' button in the top right corner. Below the menu, the 'Current Performance Documents' section is visible, showing a table of performance documents for Candra Garrett.

Employee ID	Employee	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date
4144372	Candra Garrett	Annual Review-July/June	Approval - Not Submit	07/01/2016	07/04/2016	HR Generalist: Training & Comp	07/04/2016
4144372	Candra Garrett	Annual Review-July/June	Approval - Not Submit	07/01/2015	07/31/2015	HR Generalist: Training & Comp	07/31/2015
4144372	Candra Garrett	Management	Approval - Not Submit	07/01/2014	07/31/2014	HR Generalist: Training & Comp	08/01/2014
4144372	Candra Garrett	Management	Approval - Submitted	10/01/2013	09/30/2014	HR Generalist: Training & Comp	10/01/2014



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