Understanding PeopleSoft ePerformance Business Processes

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>PeopleSoft ePerformance supports the entire planning and performance process—not just the back-end review. This end-to-end performance process consists of planning for performance, collaboratively adjusting performance criteria, tracking progress against plans, and evaluating performance against plans.</td>
</tr>
</tbody>
</table>
| 2.   | The PeopleSoft performance management business process includes:  
• Defining the performance process.  
• Generating the performance document.  
• Maintaining and tracking ongoing performance.  
• Completing the performance process.  
The marks on this chart indicate whether or not each role is involved with the corresponding steps in the process. |
| 3.   | HR Administrators plan the high-level initiatives, goals, responsibilities, and competencies for the performance process and design templates used to create the performance documents. |
| 4.   | Performance documents are created from the template definition, and performance criteria may be added or updated. |
| 5.   | The options to generate performance documents include:  
• Create the performance document for the manager only or both the manager and the employee in batch mode by the ePerformance Administrator role.  
• Create the performance document in online mode by the Manager role.  
• Personalize the employee document to include goals and objectives specific to an employee before creating the employee performance document. |
| 6.   | Managers maintain and track employee performance in the manager document. Managers use manager documents to set performance expectations and assess employee performance. They can use the Results Writer and Language Checker tools when commenting on an employee's performance.  
Employees maintain, track, and evaluate their own performance in the employee document. |
### Step 7
Completing the performance process includes the following tasks:
- The employee completes the performance document (self-appraisal).
- The manager completes the performance document.
- Approvals are obtained (if applicable). Depending on your rules, documents can go through an approval process before they are completed. Five different approval process flows are available when completing documents. Completing a document can be compared to finalizing a performance review or plan.
- The manager schedules the employee review, comments, and signoff (if applicable). Depending on your rules, managers may review the manager's document with the employee either before or after any approvals are obtained.
- The performance document is submitted for approvals and signoff.

### Step 8
Manager Document status of **Approved** depends on process flow selected in the template.

### Step 9
HR administrators or managers can transfer documents to another manager, cancel documents, extend due dates, and perform other administrative functions. HR administrators can also view the distribution of performance results, the status of documents, as well as late and missing documents. Both HR administrators and managers review past documents. If PeopleSoft Portal Pack is installed, managers can view a pagelet to alert them to upcoming performance process milestones and deadlines.

### Step 10
PeopleSoft performance management consists of four business processes:
- Defining the performance process.
- Generating the performance document.
- Maintaining and tracking ongoing performance.
- Completing the performance process.

HR Administrator, Manager, and Employee roles interact with each step in the process in different ways.

**End of Procedure.**