



TEXAS TECH UNIVERSITY
HEALTH SCIENCES CENTER™
EL PASO

Enterprise Performance Management System (ePM)



WELCOME TO THE NEW ENTERPRISE PERFORMANCE MANAGEMENT SYSTEM (ePM)

ENHANCEMENTS!

- ❖ Easy real time supervisor update
- ❖ Proxy capability
- ❖ Tab functionality
- ❖ Sections collapse
- ❖ New supervisor will see prior documents for the employees they Supervise



- ❖ Create easy to see vacant PD's for use later.
- ❖ Final documents sent straight to employee file
- ❖ Evaluation scores recorded real time In Banner
- ❖ Future enhancement: Online New Position/Reclass/Salary Review system that ties to ePM



New Vocabulary

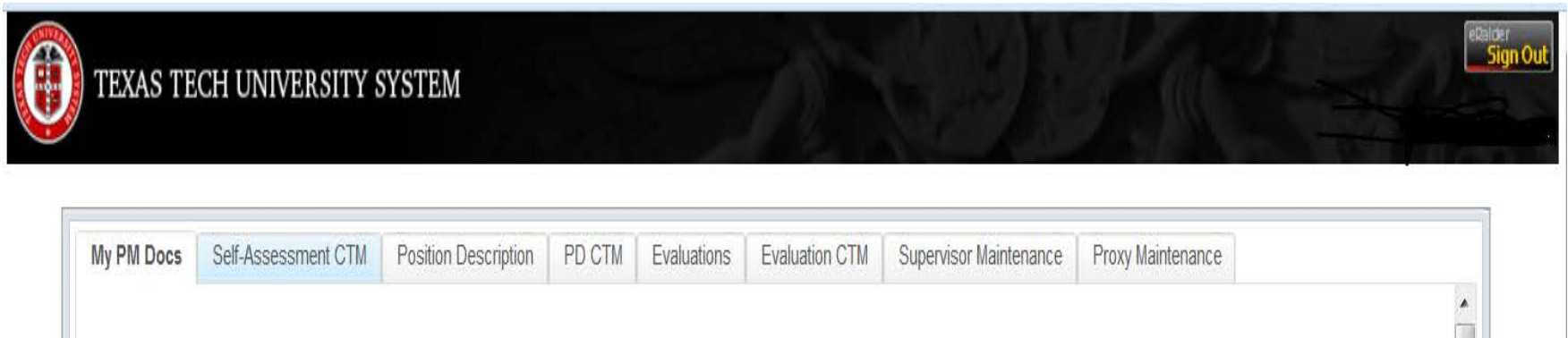
- ❖ EPD = Employee Position Description
- ❖ VPD = Vacant Position Description
- ❖ Create Start new document
- ❖ Details = Edit, View
- ❖ Vacate = Remove employee from PD and move PD to Vacant Position status
- ❖ In Progress = Not complete
- ❖ Final = Last completed document
- ❖ History = Prior completed documents
- ❖ Proxy = Name employee who can do any task you can in the system, but submit



Enterprise Performance Management System (ePM)

Tab Menu

Renders best with Chrome or Firefox. Turn off compatibility with IE.



Organizational Managers get more Tabs such as Supervisor Maintenance and Proxy Maintenance Tabs



Supervisor Maintenance Tab

- ❖ Select chart and organization
- ❖ Find Employee and highlight
- ❖ Search by name or R# and Select New Supervisor
- ❖ Submit (**Change is immediate and is fed to Banner**)
- ❖ Supervisor may have up to five proxies
- ❖ Proxy will have all the access as Supervisor
- ❖ Proxy will see and edit all the documents
- ❖ Proxy can act on Supervisor's behalf except to submit and sign
- ❖ Only the actual Supervisor can **Submit and Sign**



My PM Docs | Self-Assessment CTM | Position Description | PD CTM | Evaluations | Evaluation CTM | **Supervisor Maintenance** | Proxy Maintenance

Chart: Organization:

Search:

R#	Name	Title	Position Number	Effective Date	Supervisor R#	Supervisor Name	Supervisor Title
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Employee:

Now Reports To:

Name:

R#:

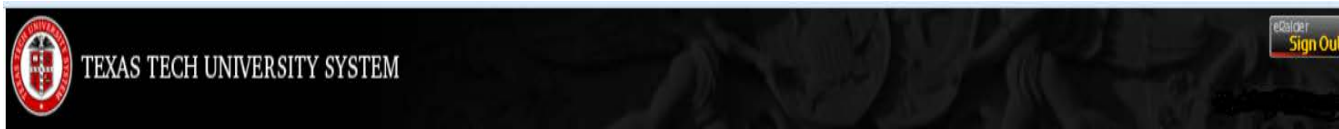
Position Number: Suffix:

Title:



Organizational Manager's Proxy

- ❖ Org Manager's proxy can perform Supervisor maintenance on behalf of the Org manager
- ❖ Click on Proxy Maintenance tab
- ❖ Click on +Create
- ❖ Search for employee to be your proxy, by R# or name
- ❖ Select from dropdown - **Supervisor Access or Full Access**
- ❖ Highlight and click Add Proxy
- ❖ Proxy Added, will be visible from Proxy Maintenance tab
- ❖ Proxy can be deleted at any time



Add New Employee Proxy

Select Search Criteria: Last Name Search Clear

R#	Last Name	First Name	Middle Initial

Add Proxy Cancel



Position Description Tab two Sections: Employee Position Description and Vacant Position Description

Click Create to begin a new Position Description or a Vacant Position Description

My PM Docs | Self-Assessment CTM | **Position Description** | PD CTM | Evaluations | Evaluation CTM | Supervisor Maintenance | Proxy Maintenance

Proxy for: HR Administrator

Employee Position Description (EPD) - Delete + Create

Search:

In Progress
 Submitted for Review
 Submitted for Final
 Waiting for Signature
 Final
 History
 Previous Supervisors' Documents

Chart: Organization:

R#	Last Name	First Name	Position Number	Title	Supervisor	Status	Transaction Type	Date Created	Details
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Vacant Position Description (VPD) - Delete + Create

Search:

Chart: Organization:

Position Number	Position Class	Title	Owner	Transaction Type	Date Created	Details
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Update an existing Position Description

The screenshot shows a 'New Position Description' dialog box. The 'PD Template' dropdown is set to 'New'. The 'PD Type' dropdown menu is open, showing options: 'New', 'Update', 'Clone', and 'Reclass'. The 'New' option is currently selected. There are 'Search' and 'Clear' buttons at the bottom left of the dialog.

The screenshot shows the same 'New Position Description' dialog box, but now the 'PD Template' dropdown is set to 'Update'. The 'PD Type' dropdown is now empty. The 'Original PD' field contains the text '06/07/2016 - R00511483 - Lesly, Rose - H95307.01'. There are 'Create' and 'Cancel' buttons at the bottom right of the dialog.

The Position Description has a Status Column and Click on Detail to Update

The screenshot shows the 'Employee Position Description (EPD)' web application interface. It includes a search bar, a list of filters (In Progress, Submitted for Review, Submitted for Final, Waiting for Signature, Final, History, Previous Supervisors' Documents), and a table of position descriptions. The table has columns for R#, Last Name, First Name, Position Number, Title, Supervisor, Status, Transaction Type, Date Created, and Details. A row is visible for Position Number E89971, Title Chief Analyst, Status In Progress, Transaction Type Current PD, and Date Created 08/15/2016. A 'Details' button is located at the end of this row.

R#	Last Name	First Name	Position Number	Title	Supervisor	Status	Transaction Type	Date Created	Details
			E89971	Chief Analyst		In Progress	Current PD	08/15/2016	Details



Final Position Description

All Sections are “Complete” and “Mark Incomplete”

New Position Description

Submit for Review Submit for Signatures Save to PDF Close

Sections	Status
Position Summary	Complete
Level of Interaction	Complete
Qualifications	Complete
Competencies for Organizational Excellence	Complete
Employee Information	Complete
Functions for Organizational Success	Complete
Physical Demands and Work Environment	Complete

Prepared Date: 07/01/2016

▶ Position Summary Complete Mark Incomplete

Directs, plans, coordinates and supervises the operation and activities of a specialized unit or small department; develops and implements policies and procedures, administers the budget, organizes tasks and sets priorities. Serves as liaison with university personnel and community at large. Works under general supervision with broad latitude for initiative and independent judgment.

▶ Level of Interaction Complete Mark Incomplete

Level of coworker interaction/dependence:
Moderate (some interaction with coworkers to accomplish work)

Level of supervision received:
Limited (worker must be highly autonomous; show much independence)

Each Section is collapsible.





**Ready to Submit for Review or Signature
Save to PDF if needed**

New Position Description

Submit for Review Submit for Signatures Save to PDF Close

Sections	Status
Position Summary	Complete
Level of Interaction	Complete
Qualifications	Complete
Competencies for Organizational Excellence	Complete
Employee Information	Complete
Functions for Organizational Success	Complete
Physical Demands and Work Environment	Complete

Sections are not Collapsed

Prepared Date: 07/01/2016

- Position Summary Complete Mark Incomplete
- Level of Interaction Complete Mark Incomplete
- Qualifications Complete Mark Incomplete
- Competencies for Organizational Excellence Complete Mark Incomplete
- Employee Information Complete Mark Incomplete
- Functions for Organizational Success Complete Mark Incomplete
- Physical Demands and Work Environment Complete Mark Incomplete
- Organization Chart Upload - Delete + Create
- Acknowledgments



Submit for Review

New Position Description

Once you select “Submit for Review” Click “+Create” in the Pop-up Box

New Position Description

PD Reviewer

R#	Last Name	First Name	Middle Initial	Review Level	Review Action	Action Date

Select Search Criteria for Reviewer, Highlight Name and select Reviewer Level

Add New PD Reviewer

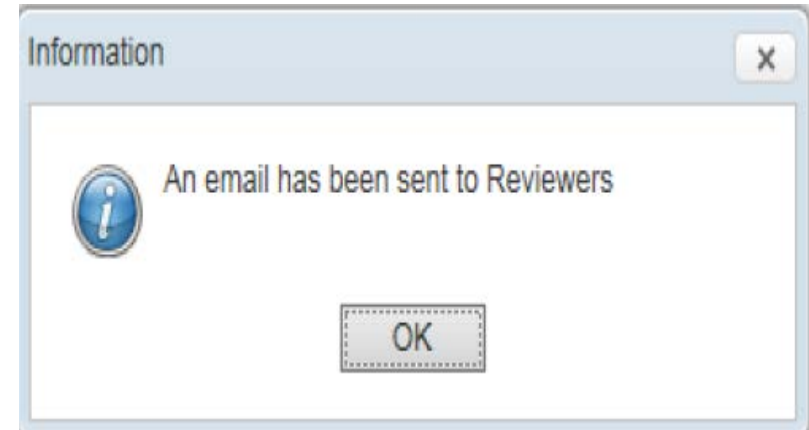
Select Search Criteria:

R#	Last Name	First Name	Middle Initial
R00000000	JONES	MARY	B

Select Reviewer Level:



Example of E-mail



From: ePM@ttu.edu[mailto:ePM@ttu.edu] Sent: Monday, July 25, 2016 5:28 PM To: Supervisor's Name@ttuhsc.edu>Subject: Position Description for "EMPLOYEE NAME"

A Position Description (PD) for "EMPLOYEE NAME" has been submitted for your review.

You may log in to the ePM System by selecting the link below. The PD waiting for your review will be found in the PD Reviews section of the Position Description tab.

Link: https://preprodapps.texastech.edu/hr_epm




Position Description has action Buttons for Reviewer

New Position Description

Approve Approve w/ Edits Reject Save to PDF Close

Sections	Status
Position Summary	Incomplete
Level of Interaction	Complete
Qualifications	Incomplete
Competencies for Organizational Excellence	Incomplete
Functions for Organizational Success	Incomplete
Physical Demands and Work Environment	Incomplete
Employee Information	Complete



- ❖ Reviewer can Add Comments
- ❖ Reviewer can make changes if allowed or simply read and save.
- ❖ An email will be sent to Supervisor when Reviewer has completed his review.

Add Reviewer Comment

I made some changes to the first function. Let me know if you need to discuss




PD in Supervisor's list as Submitted for Review, but now ready to Complete

Employee Position Description (EPD) - Delete + Create

Search:

In Progress
 Submitted for Review
 Submitted for Final
 Waiting for Signature
 Final
 History
 Previous Supervisors' Documents



R#	Last Name	First Name	Position Number	Title	Supervisor	Status	Transaction Type	Date Created	Details
			E88435	Senior Analyst		Waiting for Signature	New Position in the Budget	08/17/2016	<input type="button" value="Details"/>
			E88435	Senior Analyst		Submitted for Review	New Position in the Budget	08/17/2016	<input type="button" value="Details"/>
			E88435	Senior Analyst		Waiting for Signature	Reclassification	09/27/2016	<input type="button" value="Details"/>
			E90644	Section Coordinator		In Progress	Current PD	08/09/2016	<input type="button" value="Details"/>
			E90644	Section Coordinator		In Progress	Current PD	09/28/2016	<input type="button" value="Details"/>
			E88271	Senior Analyst		Waiting for Signature	New Position in the Budget	09/14/2016	<input type="button" value="Details"/>

< >



Once all sections are complete... Submit for Signature

New Position Description

Submit for Review Submit for Signatures Save to PDF Close

Sections	Status
Position Summary	Complete
Level of Interaction	Complete
Qualifications	Complete
Competencies for Organizational Excellence	Complete
Employee Information	Complete
Functions for Organizational Success	Complete
Physical Demands and Work Environment	Complete

Prepared Date: 07/01/2016

Position Summary Complete Mark Incomplete

Level of Interaction Complete Mark Incomplete

Qualifications Complete Mark Incomplete

Competencies for Organizational Excellence Complete Mark Incomplete

Employee Information Complete Mark Incomplete

Functions for Organizational Success Complete Mark Incomplete

Physical Demands and Work Environment Complete Mark Incomplete

Organization Chart Upload - Delete + Create



After you click on “Submit for Signature” ... Check the Box below and Click on “Sign”
Employee will get an email to sign... and PD process is now complete

Color vision (ability to identify and distinguish colors):

Peripheral vision (three dimensional distances and spatial relationships):

Ability to adjust focus (ability to adjust into sharp focus):

No special vision requirements:

Work Environment-Noise

Amount of noise typical for the work environment:

Very Quiet (library, private office):

Moderate (business office with computers and printers, light traffic):

Loud (metal can manufacturing department, large earth-moving equipment):

Very Loud (jack hammer, front row at rock concert):

Organization Chart Upload

Valid file extensions for upload are: .doc, .xls, .txt, .pdf, .csv, .xml, .rtf, .docx, .xlsx.

PD Attachments	Upload Date	Open
Biographic Data Form.pdf	8/9/16 12:53:06 PM	Open

Acknowledgments

This Position Description is current as of the date indicated below.

Signature of Employee: _____ Date: _____

Signature of Supervisor: _____ Date: _____

Close



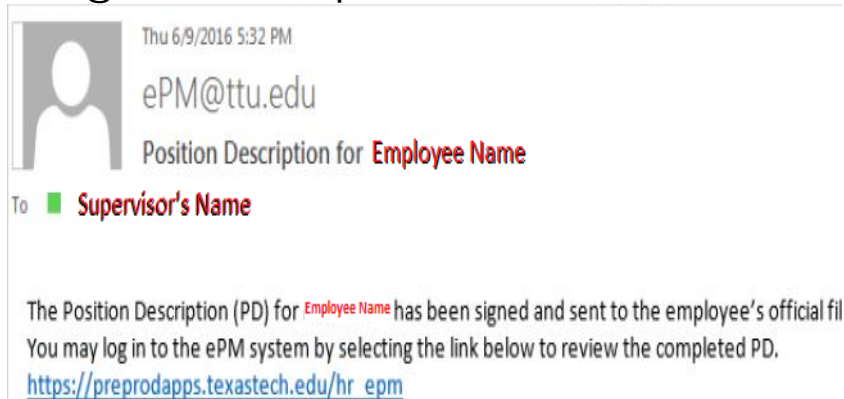
After the Supervisor Signs the employee will receive an email to sign.
Employee accesses “My PM Docs”, and selects the PD to sign and submit.

From: ePM@ttu.edu[mailto:ePM@ttu.edu]
Sent: Thursday, September 29, 2016 5:30 PM
To: Supervisor Name supervisor.name@ttuhsc.edu
Subject: Position Description ready for review and signature

Your supervisor has submitted a Position Description (PD) for your review and signature.

You may log in to the ePM system by selecting the link below. The PD will be found in the My Position Descriptions section of the My PM Docs tab.

Employee signs and supervisor receives an email:



❖ **This completes the process for a Position Description. Save as PDF is Optional.**



Evaluations

- ❖ An Evaluation should be completed after the first 6-months of employment and Yearly after that.
- ❖ A Final Position Description must be completed before an evaluation can be processed.
- ❖ Once you Create a New Evaluation, the employees you supervise will be visible on the dropdown window. Make sure you select the Evaluation Type.

New Evaluation

Chart: E

Organization: 0000000 Search

000000 - Human Resources Elp

Employee: R00000000 Employee Name E89971 00

Mark Complete

Tech ID (R-Number): R10293954

Title: Section Coordinator

Overall Evaluation Rating: 0.00

Evaluation Type: Annual

Current Hire Date: 10/20/2008

Save



Evaluations

- ❖ Enhancement to competency section must have a comment added for score under 4 and also for 7. If the comment is not inserted, you will receive an error message. Mark Complete when finished.
- ❖ Low score on Competencies or Function feeds to PIP (Performance Improvement Plan)

Competencies for Organizational Excellence - 40% of Overall score (50% if Performance Improvement/Development is N/A) Rating: 0.00

Competencies for Organizational Excellence

1. Accountability
Accepts responsibility for individual and team action in all areas of job performance.

Comments:

1 2 3 4 5 6 7

2. Adaptability
Demonstrates flexibility and adaptability to change. Effective in adjusting to new or different assignments.

Comments:

1 2 3 4 5 6 7

Performance Improvement Plan

(Required for EACH competency/standard rated less than 4)

Item#	Performance Improvement Plan	Comments	Target Date
1	Adaptability: Demonstrates flexibility and adaptability to change. Effective in adjusting to new or different assignments.	This competency had a score under 4 and therefore feeds to the Performance Improvement Plan. Insert a target date.	<input type="text" value="07/01/2017"/>

Development Plan

Jul 2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5



Evaluations

Development Plan

-Delete +Create

Item#	Goals / Development Plan	Target date
1	Gain certification with CEEB.	12/31/2017

Save

Summary Comments

Mark Complete

Supervisor Comments:

What a great year this has been in the Benefits sectin.

Save

Employee Information

Complete Mark Incomplete

Name: **Employee Name** Tech ID (R-Number): **R00000000**

Department: Human Resources Title: Section Manager

Supervisor: **Supervisor Name** Overall Evaluation Rating: 5.95

Supervisor Tech ID: **R00000000**

Date of Evaluation: 07/07/2016 Evaluation Type: Annual

Date Submitted: Current Hire Date: 09/01/2011

❖ Click on Create button to type goals/development plan and Target date.

❖ Overall summary comments section. You will see misspelled words in red. Right click to correct.

❖ Overall score shows in Employee Information



Self-Assessment

It is recommended that an employee complete a Self-Assessment prior to an Evaluation (6 mo. Evaluation is recommended; Yearly Evaluation is mandatory)

- ❖ Select the My PM Docs Tab
- ❖ Scroll down to the “Self-Assessment Section”
- ❖ Click on “Create” from the menu
- ❖ A Self-Assessment “In Progress” Status will appear on the menu
- ❖ Click on “Details” and work on the form
- ❖ Complete the four sections of the form, Sign and an email will be sent to the Supervisor for signature.

The screenshot shows a web interface with a navigation bar at the top containing tabs: My PM Docs, Self-Assessment CTM, Position Description, PD CTM, Evaluations, Evaluation CTM, Supervisor Maintenance, and Proxy Maintenance. Below the navigation bar is a section titled "Self-Assessment Section" with a "- Delete + Create" button. On the left, there are four checkboxes: "In Progress" (checked), "Completed", "Waiting for Signature", and "History". Below the checkboxes is a table with the following data:

Last Name	First Name	Tech ID	Position	Department	Self-Assessment Date	Status	Details
		E89971		Human Resources Elp	10/13/2016	In Progress	Details

Two red arrows point to the "My PM Docs" tab and the "Details" button in the table.



Evaluations

- ❖ All sections are collapsible. If you need to make any changes, just click on “Mark Incomplete” and you will be able to modify any section

New Position Description

Submit for Review Submit for Signatures Save to PDF Close

Sections	Status
Employee Information	Complete
Position Summary	Complete
Level of Interaction	Complete
Qualifications	Complete
Competencies for Organizational Excellence	Complete
Functions for Organizational Success	Complete
Physical Demands and Work Environment	Complete

Prepared Date: 08/22/2016

Employee Information Complete Mark Incomplete

Position Summary Complete Mark Incomplete

Level of Interaction Complete Mark Incomplete

Qualifications Complete Mark Incomplete

Competencies for Organizational Excellence Complete Mark Incomplete

Functions for Organizational Success Complete Mark Incomplete

Physical Demands and Work Environment Complete Mark Incomplete

Organization Chart Upload - Delete + Create

Valid file extensions for upload are: .doc, .xls, .txt, .pdf, .csv, .xml, .rtf, .docx, .xlsx.

PD Attachments	Upload Date	Open
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Evaluations

- ❖ Once all sections complete, Print to PDF for meeting with employee.
- ❖ Submit for review to someone else.
- ❖ Conference complete, edits complete
- ❖ Click to Submit for Signatures
- ❖ Once you click on “Submit for Signatures” the system will direct you to the bottom of the screen and you must put a check mark next to your Signature.
- ❖ The system will add your signature and send email to employee for he/she to sign.

New Evaluation

Submit for Review Submit for Signatures Print to PDF Close

Sections	Status
Employee Information	Complete
PD Acknowledgement	Complete
Competencies for Organizational Excellence	Complete
Performance Standards for Organizational Productivity	Complete
Performance Improvement/Development Plans for Previous Year	Complete
Performance Improvement/Development Plans for Next Year	Complete
Summary Comments	Complete

▶ Acknowledgments

This Position Description is current as of the date indicated below.

Signature of Employee: Date:

Signature of Supervisor: Date:

Submit for Review Submit for Signatures Close



Contact Information:

Tencha Ballesteros

Human Resources

hortencia.Ballesteros@ttuhsc.edu

915-215-4061