

Mass Entry Processing in PeopleSoft



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Mass Entry Highlights

This year the “PeopleSoft (PS) Mass Entry Pages” will be used primarily to capture employee rating information for Agencies who have not fully implemented ePerformance during the 2010-2011 performance plan year.

New Hires - All new hires effective 07/01/2011 will be viewable in the PS Mass Entry pages. However, the fields will be grayed out with no enter/edit capability.

Increase Recommendation Field - The “Increase Recommendation” field will not be available for employees on SWD, SRE or MD1 salary plans in the PS Mass Entry Pages as performance increases for FY12 have **not** been allocated for the executive branch agencies. (Refer to print screen on page 8)

Rating Fields - Rating fields on employee records have been pre-populated with a “3” – Successful Performer. Agencies will need to update the applicable rating field if the performance rating for the employee should be different.

The “Overall Rating” on the PS Mass Entry Pages (ePerformance and non-ePerformance records) at the end of the process will be written to the Employee Review pages adding a performance review row for this performance review cycle.

Employee Review Pages – Employee Review pages will have a new location in the 9.1 PeopleSoft Database. The new navigation is *Workforce Development > Employee Review History > Review Data Page*.

Reports - Reports and queries may be generated (Refer to *Section 5 - References* for the location of this manual).

Non- ePerformance, Partial ePerformance and Fully Implemented ePerformance Agencies

Non-ePerformance - The PeopleSoft (PS) Mass Entry Tool will be utilized to document the performance management evaluation review ratings for agencies that have not implemented ePerformance during the 2010-2011 performance plan year. Rating fields will be pre-populated with a “3” – Successful Performer. Agencies will need to update the applicable rating field if the performance rating for the employee should be different. The “Overall Rating” on the PS Mass Entry Pages at the end of the process will be written to the Employee Review pages adding a performance review row for this performance review cycle.

Partial ePerformance Implementation - Employee data for State agencies that have partially implemented ePerformance will be available on the mass entry pages. Enter/edit capabilities for rating information from ePerformance will not be accessible for records in “Complete” status; these fields will be grayed out in the PS Mass Entry Pages.

Employee records that are **not** in “Complete” status in ePerformance will show up on the Mass Entry pages with a “3” – Successful Performer. Agencies must ensure that all employee records (ePerformance and non-ePerformance) are accurate prior to established deadline as the “Overall Rating” on the PS Mass Entry Pages at the end of the process will be written to the Employee Review pages adding a performance review row for this performance review cycle.

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Fully Implemented ePerformance - State Agencies that have fully implemented ePerformance for the FY09 and FY10 Performance Management Cycle will complete documentation within ePerformance only. *Agencies must ensure that all employee records in ePerformance are in "Complete" status prior to the established deadline as the "Overall Rating" on the PS Mass Entry Pages at the end of the process will be written to the Employee Review pages adding a performance review row for this performance review cycle.* Enter/edit capabilities for rating information will not be accessible in the PS Mass Entry Pages for records in "Complete" status; these fields will be grayed out. However, employee records that are not in "Complete" status in ePerformance will show up on the Mass Entry pages with a "3" – Successful Performer on all ratings including the "Overall Rating" until the employee record is completed in ePerformance.

Changes to the Ratings Page

The performance rating scale in the PS Mass Entry Pages was updated to reflect the current five point rating scale of the Performance Management Program. Below are the acronym descriptions for the rating fields.

Acronym Descriptions:

SCC	State Core Competencies
IG/C	Individual Goals/ Competencies
Job Resp	Job Responsibilities

Rating Translation Table

The following translation table is provided for those agencies that have not converted to the five point rating scale as of the FY10 performance plan year to enter appropriate employee performance rating information in the Mass Increase pages.

Three To Five Point Performance Rating Translation

If the employee three point rating is	Use this corresponding Performance rating in PeopleSoft Salary Planning Tool
D - Did Not Meet Expectations	1 - Unsatisfactory Performer
M - Met Expectations	2 - Successful Performer (-) Minus 3 - Successful Performer 4 - Successful Performer (+) Plus
E - Exceeded Expectations	5 - Exceptional Performer
N - New Hire	N - Not Rated*
C - Considered	N - Not Rated*

*In ePerformance and on the PeopleSoft Salary Planning Tool - "Not Rated" means New Hire or Transfer within five months of end of performance period. "Not rated" may also be used in place of "Considered"

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Section 1 – Navigating to Mass Entry Window

Once you have logged-in to PeopleSoft, go to **Compensation** → **Base Compensation** → **Mass Increases**.



Under **Mass Increases**, you may choose one of the following: **EP ALT SPT by Company**, **EP ALT SPT by Dept**, **EP ALT SPT by Emplid**, and **EP ALT SPT by Mail Drop** [see descriptions of these alternatives below].



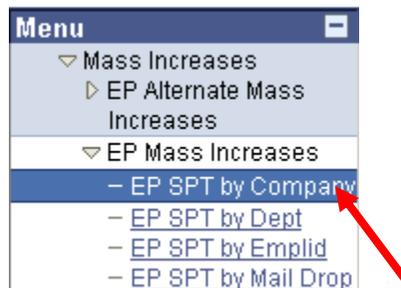
Four Choices:

- 1) If you want to enter ratings for *all* of your agency employees listed alphabetically, choose **EP SPT by Company** and follow the steps in subsection **1A: Mass Entry by Company**. [Note: If your agency has more than 300 employees, you will receive a warning that suggests that you use *EP SPT By Dept* or *EP SPT By MailDrop* instead of *EP SPT By Company*. See Section 3 – Using Lists for details]
- 2) If you want to enter ratings for *only* employees from a specific department, choose **EP SPT by Dept** and follow the steps in subsection **1B: Mass Entry by Department**.
- 3) If you want to enter ratings for a *single* employee, choose **EP SPT by Emplid** and follow the steps in subsection **1C: Entry by Employee**.
- 4) If you want to enter ratings for *only* employees with a specific Mail Drop, choose **EP SPT by Mail Drop** and follow the steps in subsection **1D: Mass Entry by Mail Drop**.

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1A: Mass Entry by Company

On the Menu under Mass Increases, click **EP SPT by Company**.



Enter the company number (you will have access *only* to your own agency) and click

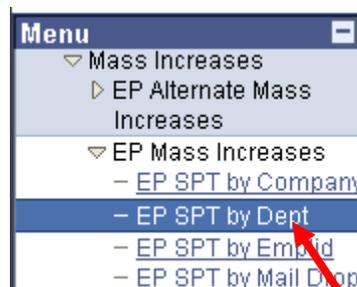
Search



Now, follow the steps in **Section 2** to enter the performance ratings.

1B: Mass Entry by Department

On the Menu under Mass Increases, click **EP SPT by Dept**.



When the following window appears, enter the department number and click

Search

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The screenshot shows the 'Menu' on the left with 'EP SPT by Dept' selected. The main window is titled 'EP SPT by Dept' and contains the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this is a search section titled 'Find an Existing Value'. The search criteria are set to 'Search by: Department begins with' followed by a text input field containing '99999999', which is circled in red. There are 'Search' and 'Advanced Search' buttons.

Now, follow the steps in **Section 2** to enter the performance ratings.

1C: Entry by Employee

On the Menu under Mass Increases, click **EP SPT by Emplid (Employee)**.

The screenshot shows the 'Menu' with 'EP SPT by Emplid' highlighted in blue. A red arrow points to this menu item.

You may search by the employee's ID number and name (first name, last name, or both). However, to narrow the search, it may be necessary to enter the employee's entire name. You must enter the name in the same format used by **Peoplesoft 8.9 (i.e, Doe,Jane – no space after comma)**. This can get a little tricky if the employee is a "Jr." For speed and ease, it is always preferable to use the employee's ID number, if you know it. Click **Search** after entering the employee's ID number.

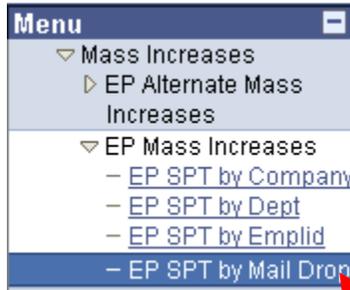
The screenshot shows the 'Menu' on the left with 'EP SPT by Emplid' selected. The main window is titled 'EP SPT by Emplid' and contains the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this is a search section titled 'Find an Existing Value'. The search criteria are set to 'EmpID: begins with' followed by a text input field containing '99999999', which is circled in red. There are also fields for 'Empl Rcd Nbr:' and 'Name: begins with'. There is a 'Case Sensitive' checkbox. There are 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria' buttons.

Now, follow the steps in **Section 2** to enter the performance ratings.

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1D: Mass Entry by Mail Drop

On the Menu under Mass Increases, click **EP SPT by MailDrop**.



When the following window appears, enter the maildrop number and click



Now, follow the steps in **Section 2** to enter the performance ratings.

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Section 2 – Entering Performance Ratings

WARNING: As the sign-on operator, you will **NOT** be able to make any changes to your own record. If you change **ANY** value on your record, you will be unable to save – even if you return your record to its original form. PeopleSoft views any change as an “update.” Once an “update” is made, the only thing you can do is close out without saving. This means that all other entries you have made will be lost. Therefore, please do not change any values in your own record.

After you click Search in the last step of subsection **1A**, **1B**, **1C**, or **1D**, you will see a screen like this one:

Ratings by Company			Amounts by Company			Employee Data by Company			
Company: 407 State Accounting Office									
Ratings									
Name	ID	Empl Rcd#	SCC	IG/C	Job Resp	Overall Rating	*Increase Recommendation	Originator	Last Updated
Ant, Adam	00000001	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			07/20/2010
Baldwin, Billy	00000002	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			07/20/2010
Bonds, Barry	00000003	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			07/20/2010
Chase, Chevy	00000004	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			07/20/2010
Day, Doris	00000005	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			07/20/2010
Dierdorf, Dan	00000006	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			07/20/2010
Dog, Deputy	00000007	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			07/20/2010
Els, Ernie	00000008	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			07/20/2010
Flinstone, Fred	00000009	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			07/20/2010

Buttons: Save Return to Search

* The **Increase Recommendation** field will not be available for Executive branch employees on SWD, SRE or MD1 salary plans.

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The following criteria will apply when updating the SCC, IG/C and Job Resp Rating fields for employees not on SWD, SRE or MD1 salary plans.

If you enter a 1, an N will **NOT** automatically be entered on the **Increase Recommendation** field.

If you enter a 2, 3, 4 or 5, you *must* enter a valid value (Y or N) in the **Increase Recommendation** field.

[NOTE: As you perform the steps in the following subsections (2A-2F), remember to click the SAVE icon periodically to save your changes.]

2A: Entering State Core Competencies (SCC) Ratings

To begin, click  under the **SCC** column for the first employee. When the Look Up SCC table appears, click on the correct rating. [Alternatively, once you know the valid values for this field, you may key-in a value instead of using look up table.]

Ratings by Company | Amounts by Company | Employee Data by Company

Company: 407 State Accounting Office

Name	ID	Empl Rcd#	SCC	IG/C	Job Resp	Overall Rating	Increase Recommendation	Originator	Last Updated
Ant, Adam	00000001	0						99999999	07/20/2010
Baldwin, Billy	00000002	0							07/20/2010
Bonds, Barry	00000003	0							07/20/2010

Look Up SCC

Search by: Review Rating begins with

[Advanced Lookup](#)

Search Results

View All First 1-6 of 6 Last

Review Rating	Description
1	1-Unsatisfactory Performer
2	2-Successful Performer - Minus
3	3-Successful Performer
4	4-Successful Performer - Plus
5	5-Exceptional Performer
N	N-Not Rated

The valid values for this required field are 1, 2, 3, 4, 5, and N^{1,2}. If you enter a **2, 3, 4 or 5**, the same rating will not automatically be entered in the following fields (**IG/C, Job Resp, Overall Rating**). You will need to enter each field separately. If you enter an **N** and the employee is not a New Hire (i.e., his/her hire date is earlier than July 1 of the current year), you will **NOT** get an error message.

¹ A rating of N – for **Not Rated** – is given when a supervisor has not had enough experience with an employee to give a proper evaluation. This usually happens when either the supervisor or the employee is new to the agency. In accordance with policy, an appointing authority may, without the necessity of completing a performance evaluation, authorize a performance-based increase for an employee who has been a subordinate of the employee's current supervisor for less than five (5) months as of July 1, 2011.

² A rating of N – for Not Rated will also be used for a **New Hire** –when the employee has a hire date later than June 30 of the current year. The field will default to an N under the Increase Recommendation column and will not be editable.

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2B: Entering Individual Goals/Competencies (IG/C) Ratings

Next, click on the drop down menu for **IG/C** for this employee.

Ratings by Company Amounts by Company Employee Data by Company

Company: 407 State Accounting Office

Name	ID	Empl Rcd#	SCC	IG/C	Job Resp	Overall Rating	Increase Recommendation	Originator	Last Updated
Ant, Adam	00000001	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		99999999	07/20/2010
Baldwin, Billy	00000002	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			07/20/2010
Bonds, Barry	00000003	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			07/20/2010

Look Up IG/C

Search by: Review Rating begins with

[Advanced Lookup](#)

Search Results

View All First 1-6 of 6 Last

Review Rating	Description
1	1-Unsatisfactory Performer
2	2-Successful Performer - Minus
3	3-Successful Performer
4	4-Successful Performer - Plus
5	5-Exceptional Performer
N	N-Not Rated

The valid values for this required field are 1, 2, 3, 4, 5 and N. Enter a rating in the **IG/C** field. If you enter an N and the employee is not a New Hire (i.e., his/her hire date is earlier than July 1 of the current year), you will **NOT** get an error message.

2C: Entering Job Responsibilities (Job Resp) Ratings

Next, click on the drop down menu for **Job Resp** for this employee.

Ratings by Company Amounts by Company Employee Data by Company

Company: 407 State Accounting Office

Name	ID	Empl Rcd#	SCC	IG/C	Job Resp	Overall Rating	Increase Recommendation	Originator	Last Updated
Ant, Adam	00000001	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		99999999	07/20/2010
Baldwin, Billy	00000002	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			07/20/2010
Bonds, Barry	00000003	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			07/20/2010

Look Up Job Resp

Search by: Review Rating begins with

[Advanced Lookup](#)

Search Results

View All First 1-6 of 6 Last

Review Rating	Description
1	1-Unsatisfactory Performer
2	2-Successful Performer - Minus
3	3-Successful Performer
4	4-Successful Performer - Plus
5	5-Exceptional Performer
N	N-Not Rated

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The valid values for this required field are 1, 2, 3, 4, 5 and N. Enter a rating in the **Job Resp** field. If you enter an N and the employee is not a New Hire (i.e., his/her hire date is earlier than July 1 of the current year), you will **NOT** get an error message.

2D: Entering Overall Ratings

Next, click on the drop down menu for **Overall Rating** for this employee.

Ratings by Company Amounts by Company Employee Data by Company

Company: 407 State Accounting Office

Name	ID	Empl Rcd#	SCC	IGIC	Job Resp	Overall Rating	Increase Recommendation	Originator	Last Updated
Ant, Adam	00000001	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		99999999	07/20/2010
Baldwin, Billy	00000002	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			07/20/2010
Bonds, Barry	00000003	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			07/20/2010

Look Up Overall Rating

Search by: Review Rating begins with

[Advanced Lookup](#)

Search Results

View All First 1-6 of 6 Last

Review Rating	Description
1	1-Unsatisfactory Performer
2	2-Successful Performer - Minus
3	3-Successful Performer
4	4-Successful Performer - Plus
5	5-Exceptional Performer
N	N-Not Rated

Reminder: The **Increase Recommendation** field will not be available for Executive branch employees on SWD, SRE or MD1 salary plans.

The valid values for this required field are 1, 2, 3, 4, 5 and N. Enter a rating in the **Overall Rating's** field. If you enter an N and the employee is not a New Hire (i.e., his/her hire date is earlier than July 1 of the current year), you will **NOT** get an error message. The following if scenarios do not apply to Executive branch employees. If you enter a **1**, an **N** will automatically be entered in the next field (**Increase Recommendation**) and will **NOT** be editable. If you enter a 2, 3, 4 or 5, you *must* enter a valid value (**Y** or **N**) in the **Increase Recommendation** field.

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2E: Entering Increase Recommendations

This section does not apply to Executive branch employees on SWD, SRE or MD1 salary plans.

After the ratings have been entered, you may enter an **Increase Recommendation** for the employee.

Ratings by Company Amounts by Company Employee Data by Company

Company: 407 State Accounting Office

Ratings										
Name	ID	Empl Rcd#	SCC	IG/C	Job Resp	Overall Rating	Increase Recommendation	Originator	Last Updated	
Ant, Adam	00000001	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N		07/20/2010	
Baldwin, Billy	00000002	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N		07/20/2010	
Bonds, Barry	00000003	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N		07/20/2010	

The valid values for the **Increase Recommendation** field are Y, N, and *blank*.

Note: If an **Overall Rating** of 1 is entered, then the **Increase Recommendation** field will default to N which will **NOT** be editable.

2F: Entering Originator IDs

Finally, an **Originator ID** may be entered. The valid values for this optional field are an Employee ID and *blank*. If an ID is entered, the system will verify that it is a valid Employee ID. If it isn't, an error message will appear, and a new ID must be entered or the box must be left blank.

Ratings by Company Amounts by Company Employee Data by Company

Company: 407 State Accounting Office

Ratings										
Name	ID	Empl Rcd#	SCC	IG/C	Job Resp	Overall Rating	Increase Recommendation	Originator	Last Updated	
Ant, Adam	00000001	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		99999999	07/20/2010	
Baldwin, Billy	00000002	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			07/20/2010	
Bonds, Barry	00000003	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			07/20/2010	

Next Step: Large agencies may want to read **Section 3** for some data entry tips. Small agencies will probably want to skip **Section 3** and go straight to **Section 4**.

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Section 3 – Using Lists

If your agency is large and you need to enter ratings for many employees (ordered by department or mail drop) you may want to use the “Lists” feature. This feature will allow you to move quickly from one department to the next (subsection 3A) or from one mail drop to the next (subsection 3B). Make sure “**begins with**” is selected in the drop-down box.

3A: Listing Departments

Note: To take advantage of this feature, you should be entering ratings for employees from several different departments *ordered sequentially*.

As you are following the steps in subsection **1B**, you have the option of entering your company number or a partial department number.

EP SPT by Dept
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Department: **begins with**

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

When you click [Search](#), this will provide a list of all the departments within your agency or a list of departments that start with the partial department number you entered.

EP SPT by Dept
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Department: **begins with**

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Search Results
View All First 1-17 of 17 Last

Department
9991012
9991024
9991048
9992024
9993024
9994024

Look down this list until you find the department you want to start with. Then, click on it and follow the steps in subsection **3D**.

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3B: Listing Mail Drops

Note: To take advantage of this feature, you should be entering ratings for employees from several different maildrops *ordered sequentially*.

As you are following the steps in subsection **1D**, you have the option of entering your company number or a partial maildrop number.

EP SPT by Mail Drop
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Mail Drop ID: begins with

Search Clear Basic Search Save Search Criteria

When you click , this will provide a list of all of your agency's mail drops or a list of drops that start with the partial maildrop number you entered.

EP SPT by Mail Drop
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Mail Drop ID: begins with

Search Clear Basic Search Save Search Criteria

Search Results
View All First 1-6 of 6 Last

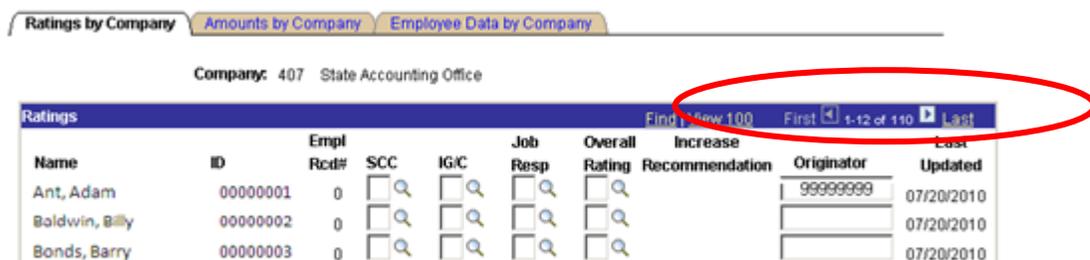
Mail Drop ID
999-110001
999-110002
999-130001

Look down this list until you find the mail drop you want to start with. Then, click on it and follow the steps in subsection **3D**.

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3C: Navigating from Window to Window

If the number of employees you are entering exceeds 12, you will have to navigate from window to window using the menu bar below. You will have the option to view up to 100 employees in the window by selecting **View 100**. By selecting the **Previous** button , you will be able to view the previous employees in the list. By selecting the **Next** button , you will be able to view the employees next in the list. **First** and **Last** buttons can be used to go to the first group of employees in the list and the last group of employees in the list, respectively. The **Find** button can be used to search for a specific employee in the list (see Section 1C).



Name	ID	Empl Rcd#	SCC	IG/C	Job Resp	Overall Rating	Increase Recommendation	Originator	Updated
Ant, Adam	00000001	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		99999999	07/20/2010
Baldwin, Billy	00000002	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			07/20/2010
Bonds, Barry	00000003	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			07/20/2010

3D: Moving to Another Department or Mail Drop in the List

When you get into the **Mass Entry** screen for the department or mail drop you selected, enter the ratings by following the steps in **Section 2**. After you have completed the ratings for this department or mail drop, you *do not* have to exit the program and re-enter to get to the next department or mail drop. All you have to do is click on the **Next in List** button at the bottom of the screen.



If you want to go back to a lower-numbered department or mail drop, use the **Previous in List** button.

Finally, if you want to see the entire list again so you can choose the exact department or mail drop you want to go to, click the **Return to Search** button.

Hopefully, this feature will aid larger agencies in quickly moving between departments and mail drops.

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Section 4 – Evaluating Changes

Once all of the performance ratings have been entered, your **EP Mass Entry by Company** (or **EP Mass Entry by Department** or **EP Mass Entry by MailDrop**) window will look similar to this:

Name	ID	Empl Rcd#	SCC	IG/C	Job Resp	Overall Rating	*Increase Recommendation	Originator	Last Updated
Ant, Adam	00000001	0	1	1	2	1			07/20/2010
Baldwin, Billy	00000002	0	5	5	5	5			07/20/2010
Bonds, Barry	00000003	0	2	3	2	2			07/20/2010
Chase, Chevy	00000004	0	1	1	N	1			07/20/2010
Day, Doris	00000005	0	2	1	5	3			07/20/2010
Dierdorf, Dan	00000006	0	3	3	3	3			07/20/2010
Dog, Deputy	00000007	0	3	3	3	3			07/20/2010
Els, Ernie	00000008	0	3	3	3	3			07/20/2010
Flinstone, Fred	00000009	0	5	5	5	5			07/20/2010

Buttons: Save, Return to Search

Notice that ratings for Adam Ant and Chevy Chase are in gray font. This means that they cannot be changed (unless the **Overall Rating** that locked them in is changed). In other words, Adam Ant's **Increase Recommendation** is locked as an **N** because his **Overall Rating** is **1**. With this rating, the only possible increase recommendation is **N**; no other recommendation (a **Y** or *blank*) is allowed.

*The **Increase Recommendation** field will not be available for Executive branch employees on SWD, SRE or MD1 salary plans.

The other panels or tabs on the top of the screen – **Amounts** (subsection **4A**) and **Employee Data** (subsection **4B**) – are view-only. No changes can be made to either of these panels.

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4A: Amounts

Click on the **Amounts by Company**, **Amounts by Department** or **Amounts by MailDrop** tab. You will see a window that looks like this:

Amounts						
Name	Old Comp Rate	PBI	Structure	PBLSP	Job	New Comp Rate
AntAdam	3,956.250000					3,956.250000
Baldwin,Billy	1,952.985012					1,952.985012
Bonds,Barry	2,202.734925					2,202.734925
Chase,Chevy	1,499.833675					1,499.833675
Day,Doris	2,334.701389					2,334.701389
Dierdorf,Dan	1,978.715400					1,978.715400
Dog,Deputy	3,180.632770					3,180.632770
Es,Ernie	1,398.745235					1,398.745235
Flintstone,Fred	900.097335					900.097335
Ford,Faith	1,875.000000					1,875.000000

After the **Name** column, there are six columns, three of which may contain monetary amounts. The first of these, **Old Comp Rate**, lists the employee's comp rate before any increases have been computed.

The next column, **PBI**, would contain the Performance-Based Increases for employees who received a **Y** in the **Increase Recommendation** column of the **Ratings** window. **PBI will be blank for employees on SWD, SRE or MDI salary plan. The old Comp Rate field will show the same amount in the New Comp Rate field.**

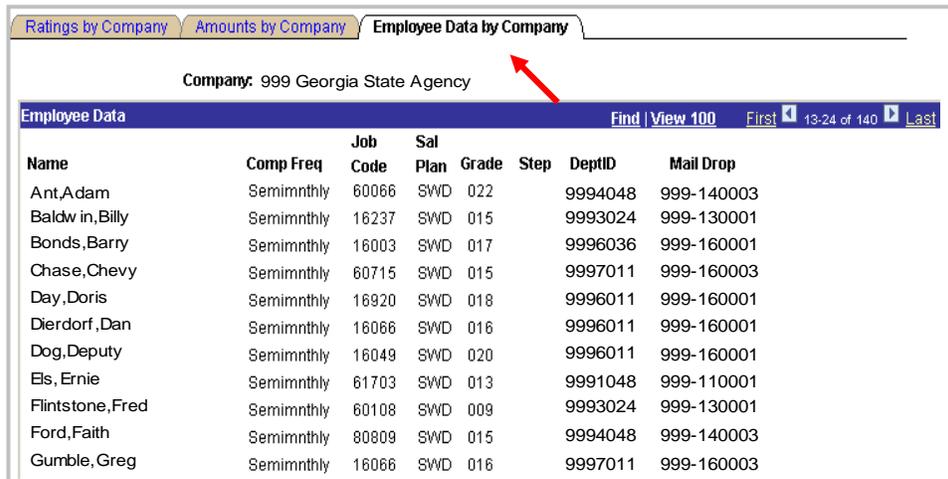
The next three columns, **Structure**, **PBLSP**, and **Job**, will be blank because these increases will not apply to any employees this year.

Finally, the **New Comp Rate** is calculated in the far right column. No increase will show the **New Comp Rate** equal to the **Old Comp Rate**. Otherwise, the **New Comp Rate** will equal the sum of the **Old Comp Rate** and the **PBI**.

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4B: Employee Data

To see the employee data, click on the **Employee Data by Company**, **Employee Data by Department** or **Employee Data by MailDrop** tab. You will see a window that looks like this:



Name	Comp Freq	Job Code	Sal Plan	Grade	Step	DeptID	Mail Drop
Ant,Adam	Semimnthly	60066	SWD	022		9994048	999-140003
Baldw in,Billy	Semimnthly	16237	SWD	015		9993024	999-130001
Bonds,Barry	Semimnthly	16003	SWD	017		9996036	999-160001
Chase,Chevy	Semimnthly	60715	SWD	015		9997011	999-160003
Day,Doris	Semimnthly	16920	SWD	018		9996011	999-160001
Dierdorf ,Dan	Semimnthly	16066	SWD	016		9996011	999-160001
Dog,Deputy	Semimnthly	16049	SWD	020		9996011	999-160001
Els,Ernie	Semimnthly	61703	SWD	013		9991048	999-110001
Flintstone,Fred	Semimnthly	60108	SWD	009		9993024	999-130001
Ford,Faith	Semimnthly	80809	SWD	015		9994048	999-140003
Gumble,Greg	Semimnthly	16066	SWD	016		9997011	999-160003

This screen provides the following background data about the employees: Name, Compensation Frequency, Job Code, Salary Plan, Grade/Step, Department ID, and Mail Drop number. This data is used to calculate all of the values on the **Amounts** panel (subsection **4A**). Therefore, changes to an employee's background data may result in changes to the **Amounts** panel. However, since the **Employee Data** panel is view-only, changes cannot be made in this window.

All changes to an employee's background data (as noted in above print screen) must be made in **Job Data** panels in **Workforce Administration**. After changes are made to these panels, the data will be refreshed *overnight*, and the **Mass Entry** panels will be updated the next day. *No changes need to be made to the **Ratings** panel.*

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Section 5 – References

- 1) **Running Reports** – refer to PeopleSoft Mass Entry: Creating and Interpreting Reports manual on SAO website: <http://sao.georgia.gov> From the Home page navigate to:

Systems > Human Capital Management > Human Resources > Performance Evaluation Rating Processing

- 2) **Performance Management Policy** – visit: <http://www.spa.ga.gov/>. From the right-hand menu, click *State Personnel Board Rules, Chapter 478-1: Rules of the State Personnel Board, Rule 14 – Performance Management (478-1-.14)*

- 3) **Performance Management Program Information and Resources**, visit: <http://www.spa.ga.gov/employees/eperformance.asp>. For ePerformance technical assistance, contact the *Talent Management Center of Excellence Helpdesk* at **1-877-318-2772**. Hours of operation are **8:00 a.m. to 4:30 p.m.** Monday – Friday. You may also e-mail your question(s) to talentmanagement@spa.ga.gov

- 4) **PS Mass Entry User Support**

Fatisha Grimes at:

SAO Customer Service Center
404-657-3956 or 888-896-7771 option 3
HCM@sao.ga.gov