Mass Entry Processing in PeopleSoft

September, 2013

Mass Entry Processing in PeopleSoft

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Mass Entry Highlights

New for 2013!

Rating Status Field – This field indicates whether a rating has been completed or if the employee will not be rated this performance year. The rating status field for all employee records will pre-populate with an Incomplete.

Rating Source Field – This field indicates whether the rating exists in ePerformance or was entered manually by HR. The rating source field for all employees will pre-populate with No Rating and will change to SP Tool or ePerform once a rating is entered manually or is generated from ePerformance.

Numeric Rating Fields - This year the rating field has been revised to accommodate the numeric value to the second decimal. Rating fields on employee records will have a No Rating status. When entering a rating, only a numeric rating between 1.00 and 5.00 will be allowed. For example, if the numeric rating is a 3.25 for the employee, you must enter 3.25. ALL agencies will need to review the rating fields for each employee who is to receive a rating for the performance period.

This year the PeopleSoft (PS) Mass Entry Pages/Salary Planning Tool will be used to capture employee rating information for **ALL** agencies for the 2012-2013 performance plan year.

Salary Planning Tool?

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.

New Hires - All new hires effective 07/01/2013 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 FY14 have **not** been allocated for the executive branch agencies. (Refer to screen print on page)

Employee Review Pages – Employee Review pages have been re-designed to accommodate the new fields in the Salary Panning Tool. The navigation for the employee review pages 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-ePerfomance, 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

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ePerformance during the 2012-2013 performance period. Rating status fields will be pre-populated with an Incomplete and a Rating Source of No Rating. ALL agencies will need to update the rating fields for each employee who is to receive a rating for the performance period. The Overall Rating in the PeopleSoft 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 evaluation 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 Approved status. These fields will be grayed out in the PeopleSoft Mass Entry Pages.

Employee records that are not in Approved status in ePerformance will display on the Mass Entry pages with a Rating Source of No Rating and a Rating Status of Incomplete. Agencies must ensure that all employee records (ePerformance and non-ePerformance) are accurate and the rating (where applicable) is in agreement with the rating in ePerformance prior to established deadline. The Overall Rating on the PeopleSoft 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.

Fully Implemented ePerformance - State Agencies that have fully implemented ePerformance for the FY13 Performance Management period will complete the evaluation within ePerformance only. Agencies must ensure that all employee records in ePerformance are in an Approved status prior to the established deadline. The overall Rating on the PeopleSoft 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 evaluation period. Enter/edit capabilities for rating information will not be accessible in the PS Mass Entry Pages for records in an Approved status; these fields will be grayed out. However, employee records that are not in an Approved status in ePerformance will show up on the Mass Entry pages with an Overall Rating of 0.00 and a Rating Status of Incomplete 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.

5 – Exceptional Performer
4 – Successful Performer – Plus
3 – Successful Performer
2 – Successful Performer – Minus
1 – Unsatisfactory Performer

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 FY13 performance plan year to enter appropriate employee performance rating information in the Mass Increase Entry pages.

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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 → EP Mass Increases**.

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

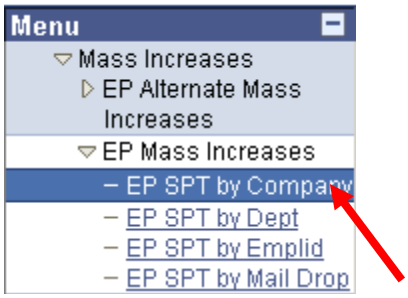
Salary Planning Tool Options:

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**.

Mass Entry Processing in PeopleSoft

1A: Mass Entry by Company

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

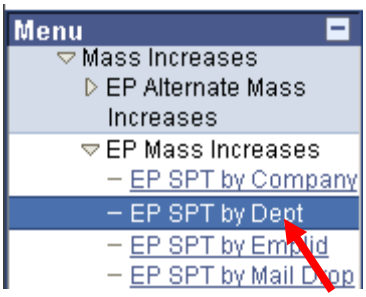


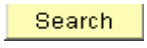
Enter your company number (you will have access *only* to your own agency) and click

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 

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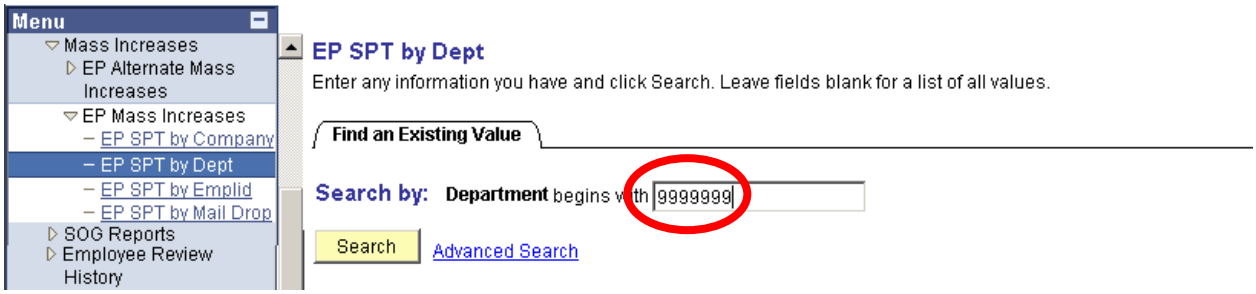
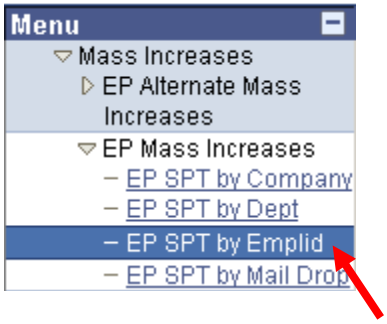


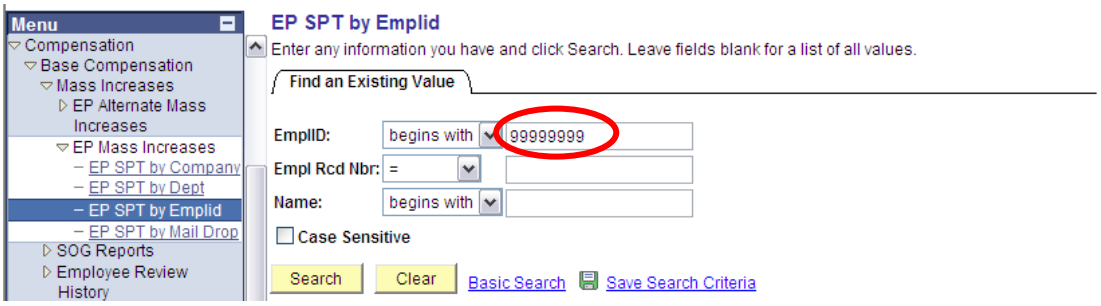
Now, follow the steps in **Section 2** to enter the performance ratings.

1C: Entry by Employee

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



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 in **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.



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

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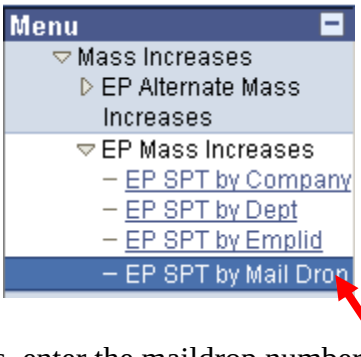
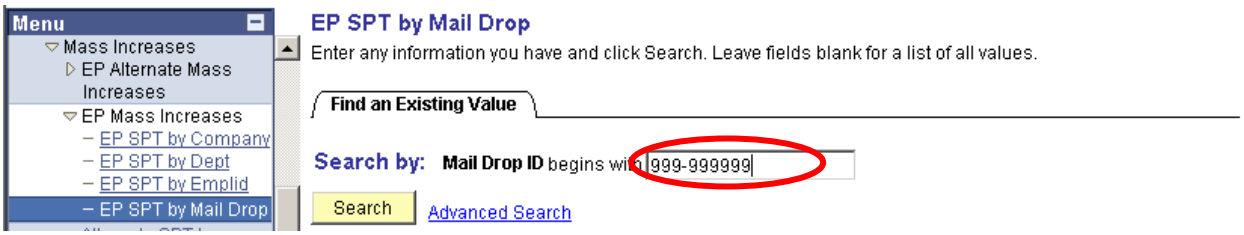
1D: Mass Entry by Mail Drop

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



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



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

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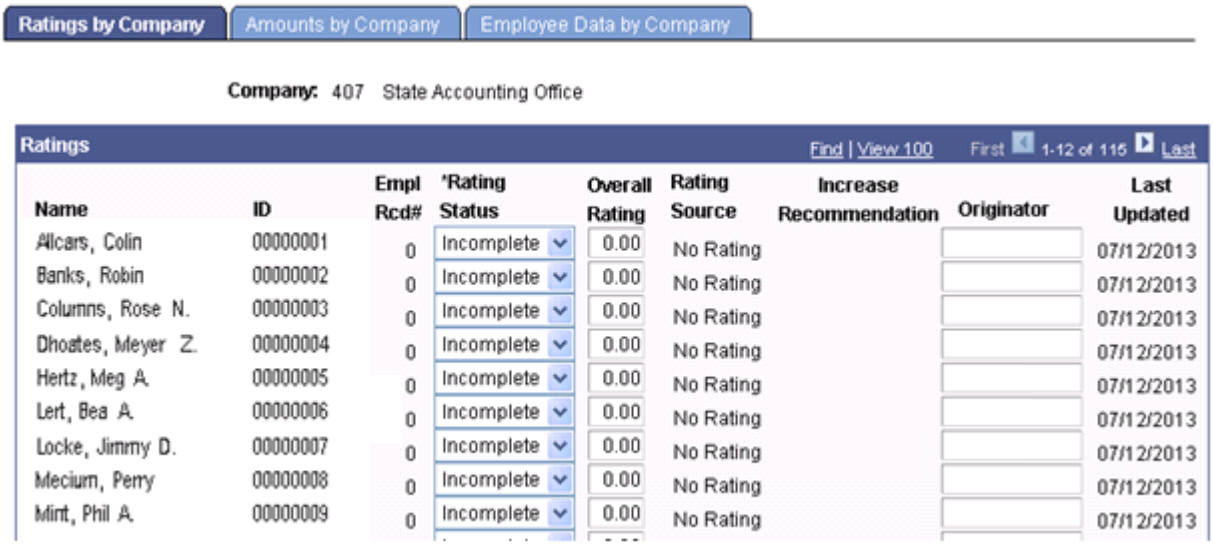
Section 2 – Entering Performance Ratings

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:



Name	ID	Empl Rcd#	*Rating Status	Overall Rating	Rating Source	Increase Recommendation	Originator	Last Updated
Allcars, Colin	00000001	0	Incomplete	0.00	No Rating			07/12/2013
Banks, Robin	00000002	0	Incomplete	0.00	No Rating			07/12/2013
Columns, Rose N.	00000003	0	Incomplete	0.00	No Rating			07/12/2013
Dhoates, Meyer Z.	00000004	0	Incomplete	0.00	No Rating			07/12/2013
Hertz, Meg A.	00000005	0	Incomplete	0.00	No Rating			07/12/2013
Lert, Bea A.	00000006	0	Incomplete	0.00	No Rating			07/12/2013
Locke, Jimmy D.	00000007	0	Incomplete	0.00	No Rating			07/12/2013
Mecium, Perry	00000008	0	Incomplete	0.00	No Rating			07/12/2013
Mint, Phil A.	00000009	0	Incomplete	0.00	No Rating			07/12/2013

* 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 <u>not</u> on SWD, SRE or MD1 salary plans.

If you enter a **1**, a **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 Overall Ratings

The section rating fields have been removed. You will **ONLY** need to enter the numeric overall rating for each employee. The numeric rating for the employee will be manually entered in the overall rating field.

NOTE: The look up icon to select a rating and drop down menu for the rating scale has been removed.

For example, if an employee receives a numeric rating of a 4.32, manually enter 4.32 into the overall rating field. The Rating Source will automatically change to SPT to indicate the rating was entered manually.

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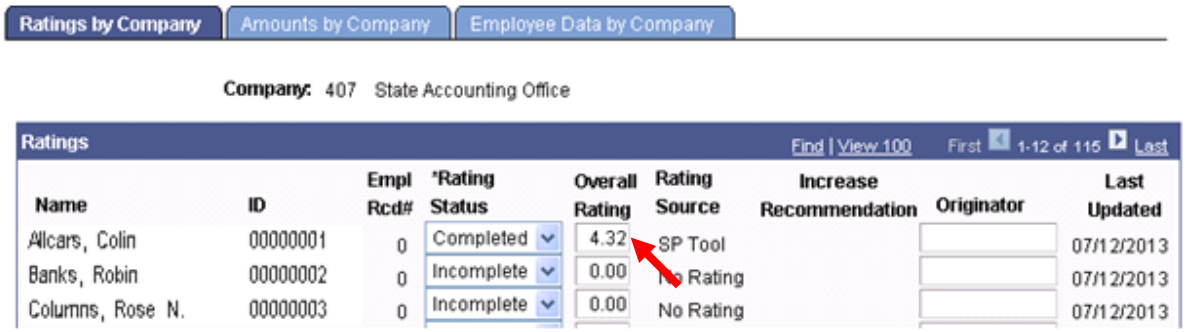
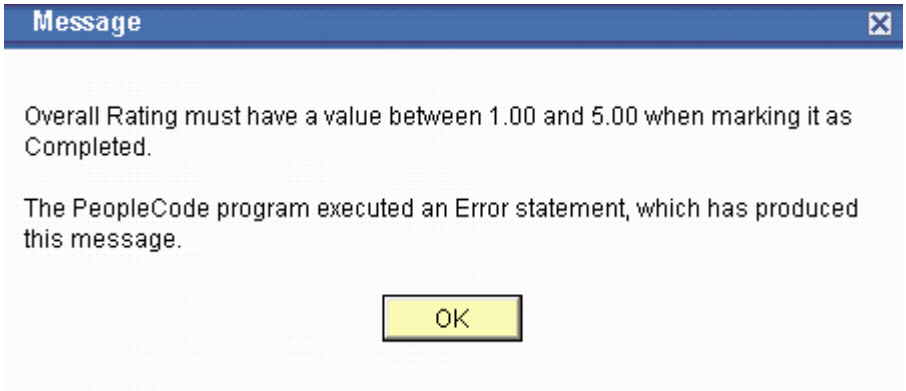
2B: Entering Rating Status

Once the numeric rating has been entered, the Rating Status will automatically update to Completed.



NOTE: If you enter an invalid rating, the system will generate the error message below. Click OK and re-enter a valid rating.



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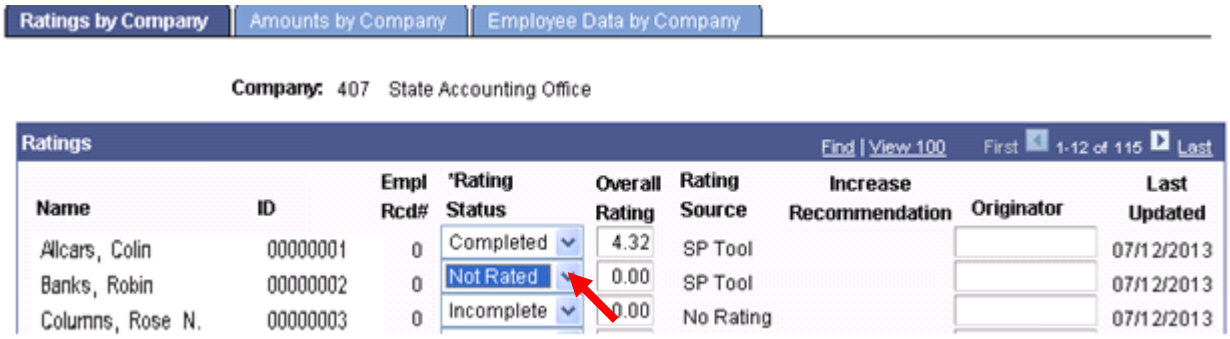
2C: Entering Not Rated

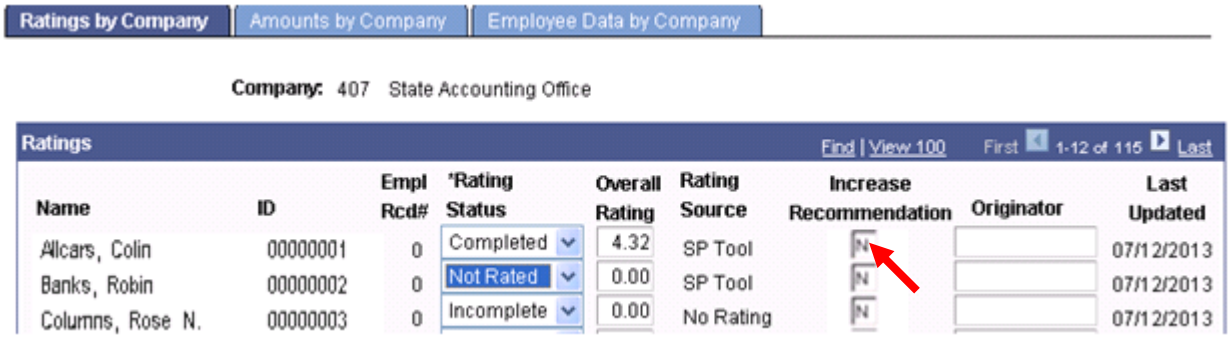
If an employee receives a rating of Not Rated, click the drop-down menu to select Not Rated. The Rating Source will update to SP Tool.



2D: Entering Increase Recommendations

This section does <u>not</u> apply to Executive branch employees on SWD, SRE or MD1 salary plans for the FY14 performance period.

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



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

2E: 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.

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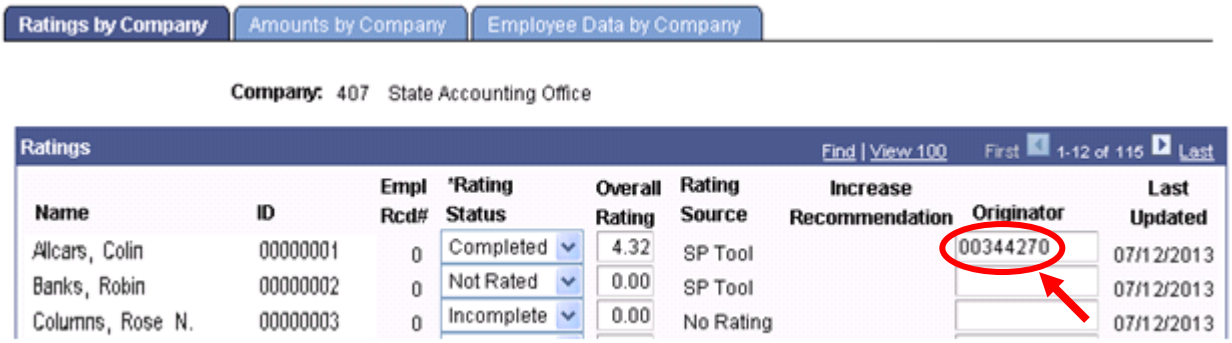

Next Step: Large agencies may want to read **Section 3** for some data entry tips. Small agencies will probably want to skip **Section 3** and go straight to **Section 4**.

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Section 3 – Using Lists

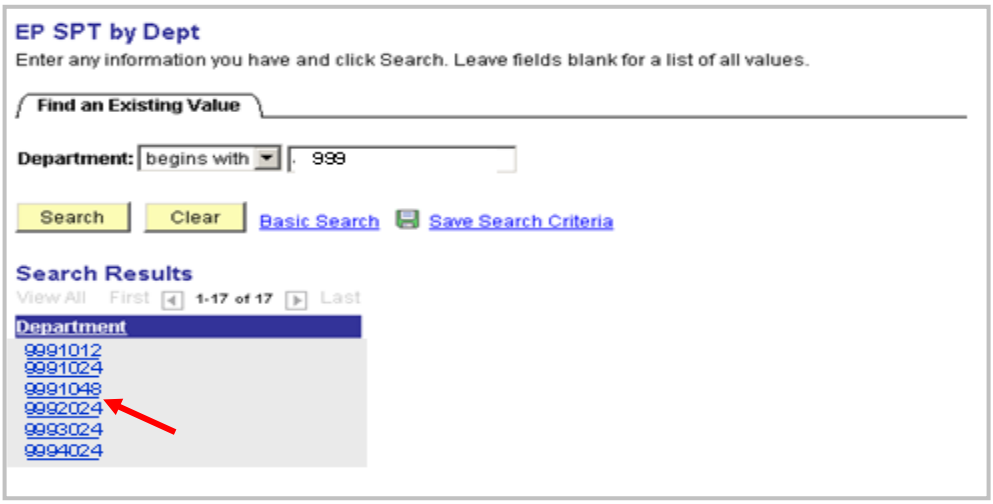
If your agency is large and you need to enter ratings for many employees (ordered by department or mail drop) you may want to use the "Lists" feature. This feature will allow you to move quickly from one department to the next (subsection 3A) or from one mail drop to the next (subsection 3B). Make sure "**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 department number or a partial department number.

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.



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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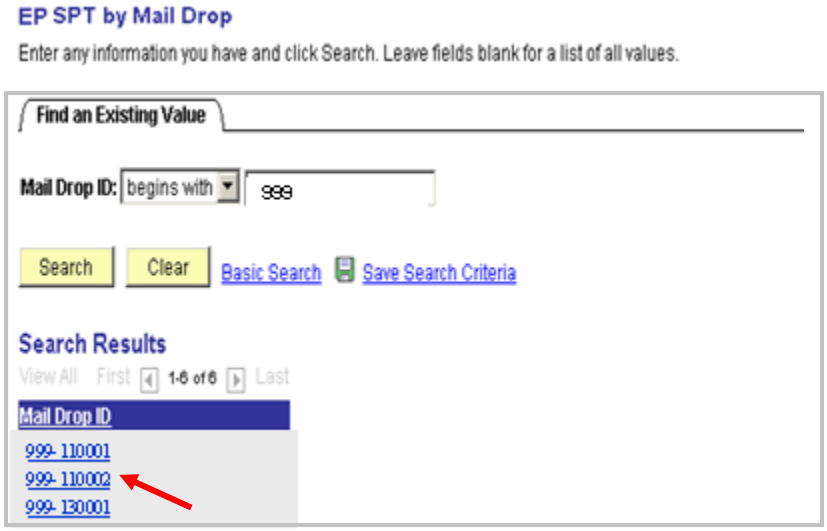
3B: Listing Mail Drops

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.

When you click Search, 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.



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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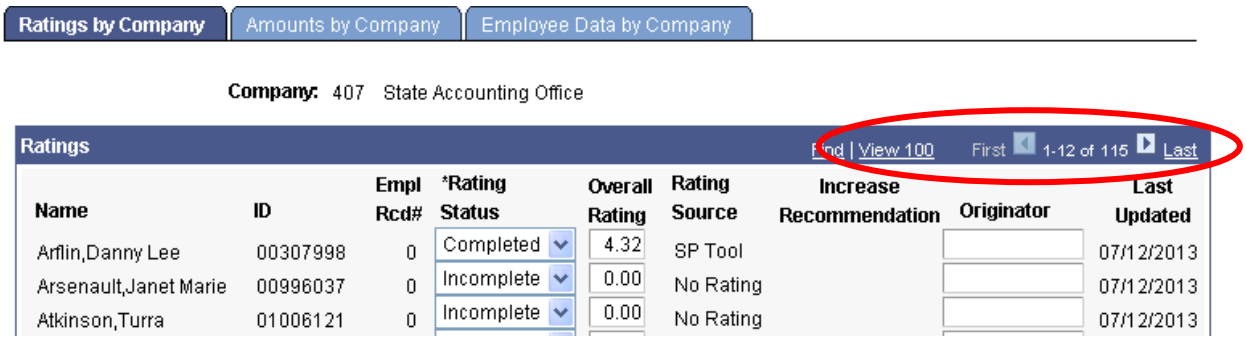
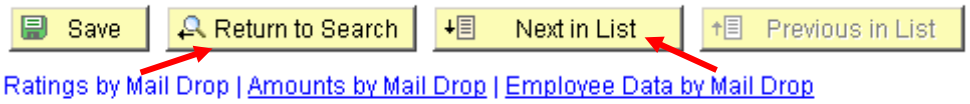
3C: Navigating from Window to Window

If the number of employees you are entering exceeds 12, you will navigate from window to window using the tabs 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).



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, click on the **Next in List** button at the bottom of the screen to get to the next department or mail drop.



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

ePerformance agencies must access view documents to ensure the overall rating for EACH employee who received an evaluation is accurate.

Ratings by Dept | Amounts by Dept | Employee Data by Dept

Department: 407031

Ratings — Find | View All — First 13-24 of 61 Last

Name	ID	Empl Rcd#	*Rating Status	Overall Rating	Rating Source	Increase Recommendation	Originator	Last Updated
Allcars, Colin	00000001	0	Completed	3.30	E-Perform		00991850	06/27/2013
Banks, Robin	00000002	0	Incomplete	0.00	No Rating			04/30/2013
Columns, Rose N.	00000003	0	Incomplete	0.00	No Rating			04/30/2013
Dhoates, Meyer Z.	00000004	0	Incomplete	0.00	No Rating			04/30/2013
Hertz, Meg A.	00000005	0	Incomplete	0.00	No Rating			04/30/2013
Lert, Bea A.	00000006	0	Completed	3.77	E-Perform		00991850	06/27/2013

NOTE: The ratings are will be grayed out. If the rating status or overall rating needs to be updated, the user will need to make the correction in ePerformance.

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

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

Company: 407 State Accounting Office

Ratings — Find | View 100 — First 1-12 of 115 Last

Name	ID	Empl Rcd#	*Rating Status	Overall Rating	Rating Source	Increase Recommendation	Originator	Last Updated
Allcars, Colin	00000001	0	Completed	3.67	SP Tool			07/12/2013
Banks, Robin	00000002	0	Not Rated	0.00	SP Tool			07/12/2013
Columns, Rose N.	00000003	0	Completed	3.27	SP Tool			07/12/2013
Dhoates, Meyer Z.	00000004	0	Completed	4.19	SP Tool			07/12/2013
Hertz, Meg A.	00000005	0	Completed	2.95	SP Tool			07/12/2013
Lert, Bea A.	00000006	0	Completed	3.43	SP Tool			07/12/2013
Locke, Jimmy D.	00000007	0	Incomplete	0.00	No Rating			07/12/2013
Mecium, Perry	00000008	0	Not Rated	0.00	SP Tool			07/12/2013
Mint, Phil A.	00000009	0	Completed	4.32	SP Tool			07/12/2013

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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:

Name	Old Comp Rate	PBI	Structure	PBLSP	Job	New Comp Rate
Allcars, Colin	2,723.775833					2,723.775833
Banks, Robin	3,388.085005					3,388.085005
Columns, Rose N.	3,541.666667					3,541.666667
Dhoates, Meyer Z.	1,604.072391					1,604.072391
Hertz, Meg A.	3,604.166667					3,604.166667

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 MD1 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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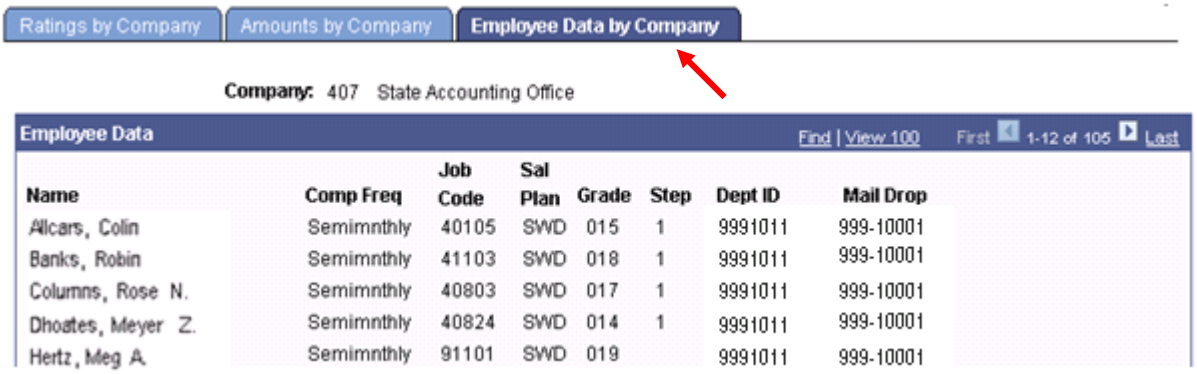
4B: Employee Data

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	Dept ID	Mail Drop
Allcars, Colin	Semimnthly	40105	SWD	015	1	9991011	999-10001
Banks, Robin	Semimnthly	41103	SWD	018	1	9991011	999-10001
Columns, Rose N.	Semimnthly	40803	SWD	017	1	9991011	999-10001
Dhoates, Meyer Z.	Semimnthly	40824	SWD	014	1	9991011	999-10001
Hertz, Meg A.	Semimnthly	91101	SWD	019		9991011	999-10001

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 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*.

Mass Entry Processing in PeopleSoft

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** – Personnel Board Rules are housed on the Secretary of State's website at http://rules.sos.state.ga.us. Click *Rules of the State Personnel Board Rules*, then *Performance Management (*478-1-.14)

3) **Performance Management Program Information and Resources**, visit: http://doas.ga.gov/StateLocal/HRA/performance/Pages/Home.aspx For ePerformance assistance, call **1-404-656-2705**. Hours of operation are **8:30 a.m.** to **4:30 p.m.** Monday – Friday. You may also e-mail your question(s) to ePerformance@doas.ga.gov

4) **PS Mass Entry User Support**

   Jeff Maile at:

   HCM Production Support
   404-657-3956 or 888-896-7771 option 2, then 1
   HCM@sao.ga.gov