

PeopleSoft HCM Training

Manager Self Service

Unsatisfactory Performance Notice (UPN)



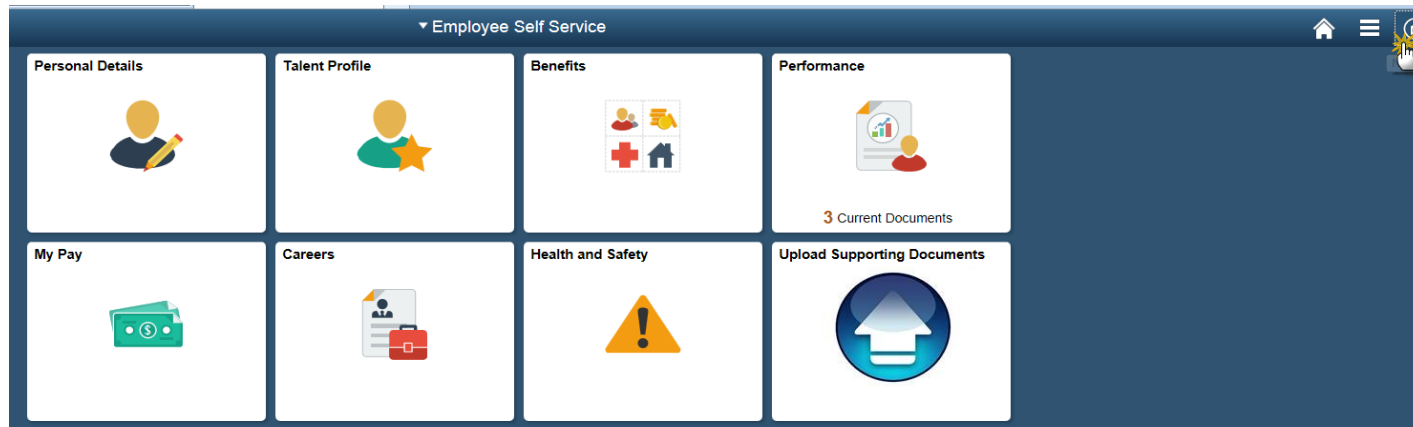
Manager Logs into PeopleSoft



Manager Creates a Document

Navigation:

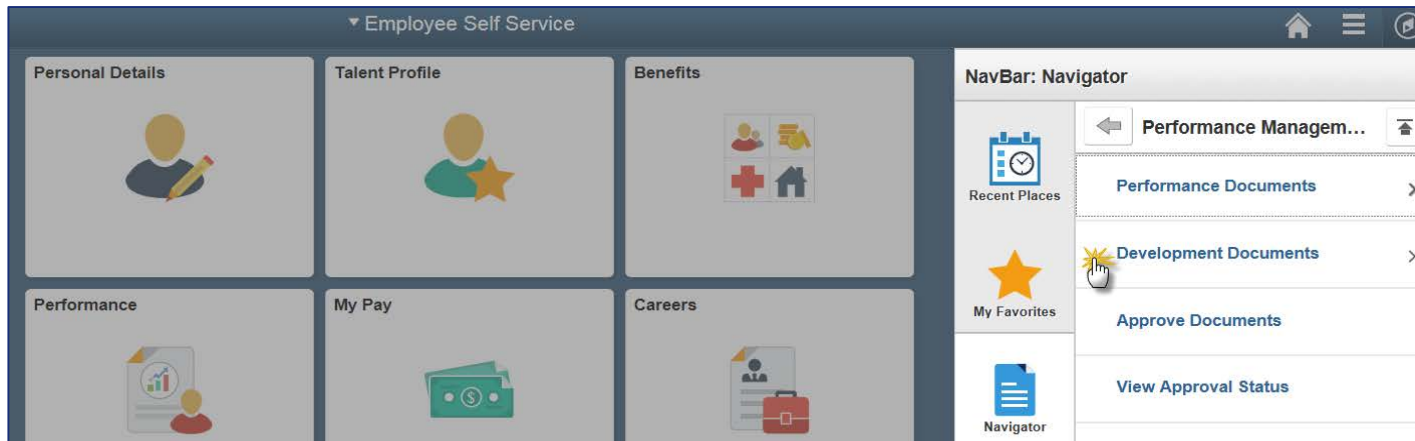
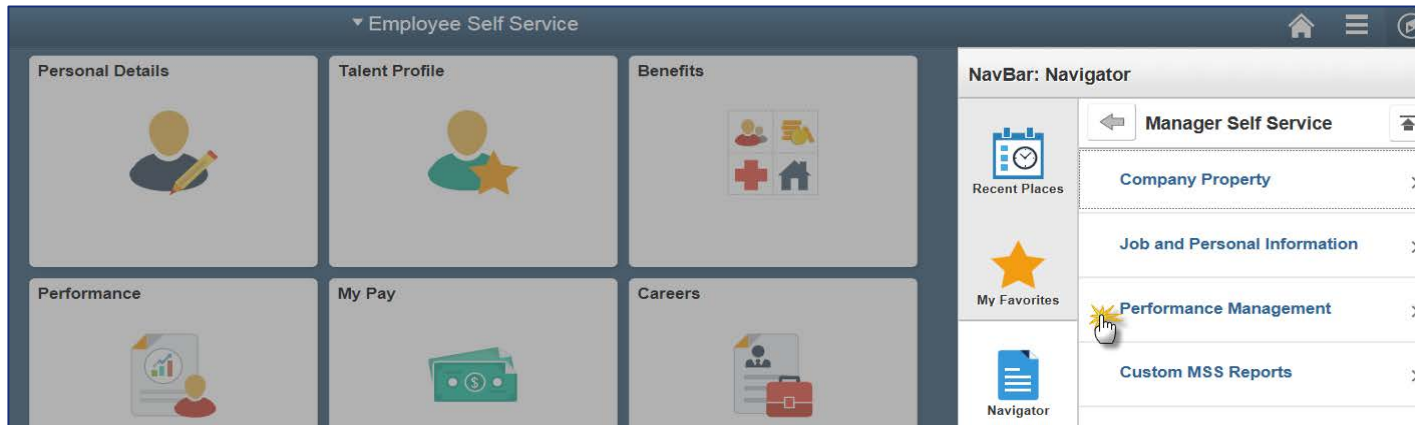
- NavBar (upper right corner) > Navigator > Manager Self Service >



Manager Creates a Document (cont'd)

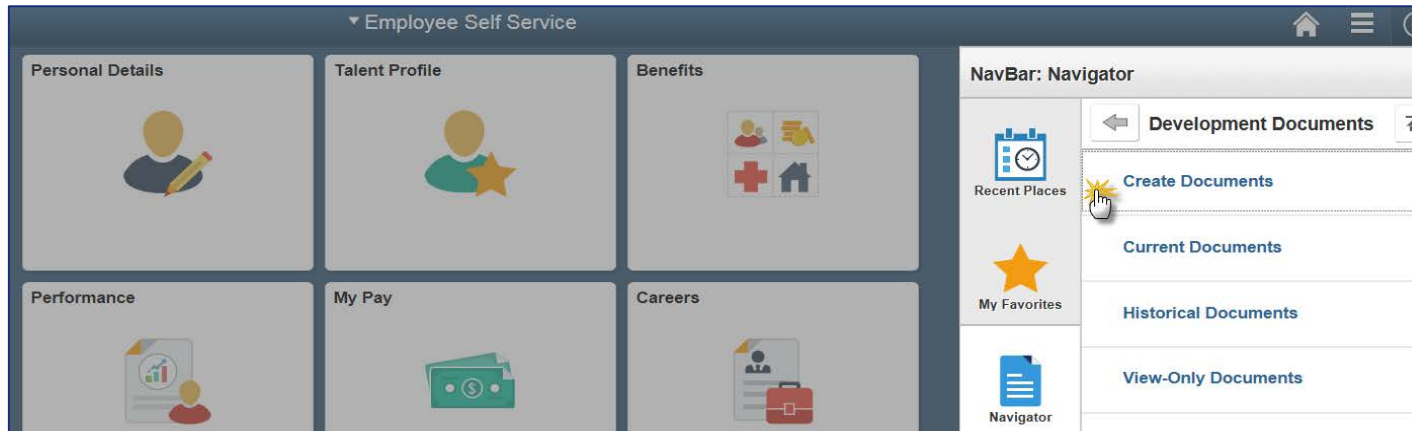
Navigation (cont'd):

- Performance Management > Developmental Documents >



Navigation (cont'd):

- Create Documents



Manager Creates a Document (cont'd)

Manager Selects Employee and then clicks on Continue

Employee Self Service **Create Development Documents**

Create Development Documents

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

As Of Date: 09/01/2017 Refresh Employees

Find Employee

Select	Name	Empl ID	HR Status	Job Title	Department
<input checked="" type="checkbox"/>	CRISTINA VASQUEZ	100048755	Active	Dir. Operations (EDP)	MEDICAL RECORDS

Select All Deselect All

Continue

1 (Callout box pointing to the selected checkbox)

2 (Callout box pointing to the Continue button)

Manager Creates a Document (cont'd)

Create Development 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 Period End Date

Document Type ▼

Clone from Prior Document ▼

Template ▼

- Enter Period Begin Date & Period End Date
- Choose HHC Development from Document Type
- Select Unsatisfactory Perform Notice from Template drop down
- Click on Create Document

Selected Employees

Employee ID	Last Name	First Name
100048755	VASQUEZ	CRISTINA

[Return to Select Employees](#)


Manager Creates a Document (cont'd)

Verify Document has been successfully created

Create Development Documents - Results
Below are the results for the employees you selected.

Selected Employees				
Employee ID	Name	Template	Successful Creation?	Status
100048755	CRISTINA VASQUEZ	Unsatisfactory Perform Notice	Yes	Document created successfully

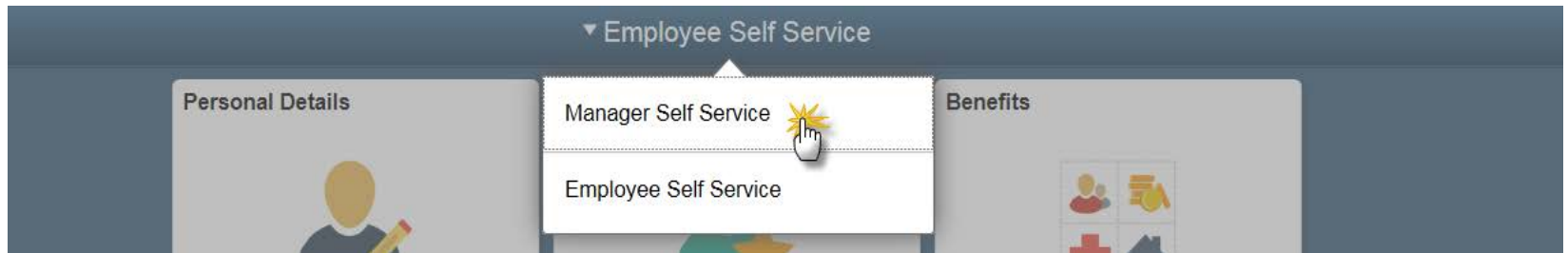
Go To [Create Documents](#)
[Current Documents](#)



Manager Completes UPN

Navigation:

-  > Manager Self Service (from the dropdown) > Team Performance



Manager Completes UPN (cont'd)

Manager selects the HHC Development Document with the “Period Begin/Period End” that correspond with the UPN that was just created for the employee:

The screenshot shows a web interface for managing documents. On the left, a sidebar labeled 'Current Documents' has a count of 17. The main area is titled 'Current Documents' and features a 'Create Documents' button. Below this is a table with the following data:

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
CRISTINA VASQUEZ Student	HHC Development Documents	Evaluation in Progress	09/01/2017 09/30/2017	09/30/2017 >

Manager Completes UPN (cont'd)

Performance Process

Steps and Tasks

CRISTINA VASQUEZ 6
HHC Development Documents
09/01/2017 - 09/30/2017 Overview

- Complete Mentor Evaluation
Due Date 09/30/2017
- Update and Submit
- Pending Approval
- Complete

HHC Development Documents

HHC Development Documents - Update and Submit

CRISTINA VASQUEZ

Job Title Student

Document Type HHC Development Documents

Template

Status Evaluation in Progress

Mentor **MARY MANAGER**

Period 09/01/2017 - 09/30/2017

Document ID 292765

Due Date 09/30/2017

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 - Instruction

|

▶ UNSATISFACTORY PERFORMANCE AREA(S)

▼ Section 2 - Unsatisfactory Performance Areas

▼ Audit History

	Created By	MARY MANAGER	09/08/2017 4:26:44PM
	Last Modified By	MARY MANAGER	09/08/2017 4:39:59PM

Manager Completes UPN (cont'd)

The screenshot displays a web interface for 'Team Performance'. On the left, a sidebar shows a performance process for 'CRISTINA VASQUEZ' with 6 items. The current task is 'Complete Mentor Evaluation' with a due date of 09/30/2017. The task progress is shown as 'Update and Submit' (highlighted in yellow), 'Pending Approval', and 'Complete'. On the right, the 'HHC Development Documents' section has an 'Add Item' button. Below it are two options: 'Add pre-defined item' (radio button) and 'Add your own Item' (checkbox). A 'Next' button is highlighted with a hand cursor, and a 'Return' button is visible below it. A callout box on the right contains the text: 'Click on Add your own Item' and 'Click on Next'.

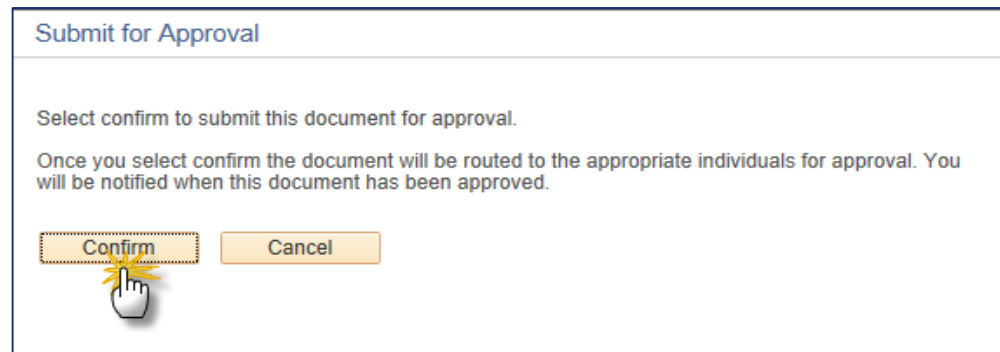
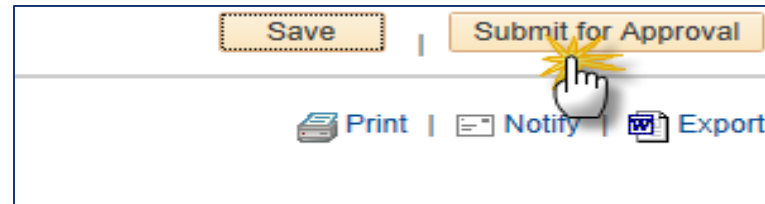
Manager Completes UPN (cont'd)

The screenshot displays a web application interface for 'Performance Process'. On the left side, there is a sidebar with a 'Steps and Tasks' section. It lists 'CRISTINA VASQUEZ' with a count of '6' and 'HHC Development Documents' for the period '09/01/2017 - 09/30/2017'. Below this, a task 'Complete Mentor Evaluation' is shown with a due date of '09/30/2017'. A sub-task 'Update and Submit' is highlighted in yellow, with a status of 'Pending Approval' and a 'Complete' button. At the bottom of the sidebar is an 'Add' button with a hand cursor icon and a 'Return' link.

The main content area is titled 'HHC Development Documents' and 'Add Your Own Item'. It features a form with a '*Title' field containing 'Projects' and a 'Description' field. The description field has a rich text editor toolbar with options for undo, redo, font, size, bold, italic, underline, bulleted list, numbered list, text color, and background color. The text in the description field reads: 'Employee did not complete any projects in 2016.'

Manager Completes UPN (cont'd)

- Manager is able to add as many items as necessary.
- After all items have been added, Manager will “Submit for Approval” (upper right corner), and then “Confirm” that the UPN should be sent to the Reviewer for their approval (this will be in a popup box):



Emails Received

- Following emails are received by Manager and Reviewer (respectively):

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: 100048755

Employee Name: CRISTINA VASQUEZ

Transaction: Performance Document

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

https://hrms.nychhc.org/psp/hrprd/EMPLOYEE/HRMS/c/ROLE_MANAGER.EP_APPRAISAL_STAT.GBL?Page=EP_APPRAISAL_EE&Action=U&EP_APPRAISAL_ID=292765

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

The following request has been submitted by MARY MANAGER . This request requires your approval before the performance document can be finalized.

Submitted Request

Employee Id: 100048755

Employee Name: CRISTINA VASQUEZ

Transaction: Performance Document

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

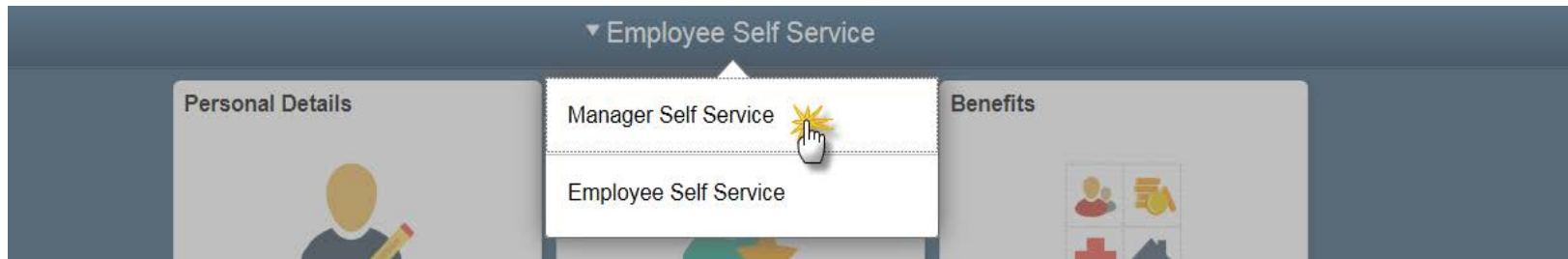
https://hrms.nychhc.org/psp/hrprd/EMPLOYEE/HRMS/c/ROLE_MANAGER.EP_APPRAISAL_XFR.GBL?Page=EP_APPRAISAL_XFR&Action=U&EP_APPRAISAL_ID=292765

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

Reviewer Approves or Denies


Navigation:

- Reviewer logs into PeopleSoft >  > Manager Self Service (from the dropdown) > Manager Dashboard



Reviewer Approves or Denies (cont'd)

Manager Dashboard

 Pending Approvals  

Approval	Name	Effective Date	Approval Receipt Date
Performance Document	CRISTINA VASQUEZ	N/A	09/08/2017

Reviewer Approves or Denies (cont'd)

Approve Document

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

CRISTINA VASQUEZ Emp ID 100048755

Actions ▾

Performance Document

Doc Type HHC Development Documents

Author MARY MANAGER

Period Begin Date 09/01/2017 Period End Date 09/30/2017

Rating

Performance Document Details

Evaluation Approval Chain

Review Employee: Pending

Evaluation Approval Chain

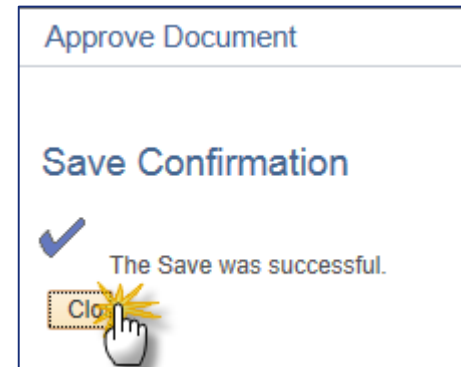
Pending

FRANK
ePerformance Approving Mgr

Comment

Approve Deny

Document can be reviewed by Clicking on the hyperlink



Note: If the Reviewer clicks “Deny,” the Manager is notified by email that the UPN was sent back for revision(s).

Emails

- Manager receives the following 2 emails after the document has been approved by the Reviewer:

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

The request has been approved by FRANK

Employee Id: 100048755
Employee Name: CRISTINA VASQUEZ
Transaction: Performance Document

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

https://hrms.nychhc.org/psp/hrprd/EMPLOYEE/HRMS/c/ROLE_MANAGER.EP_APPRAISAL_STAT.GBL?Page=EP_APPRAISAL_EE&Action=U&EP_APPRAISAL_ID=292765

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

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

The following request has been approved by all required approvers and the document has been finalized.

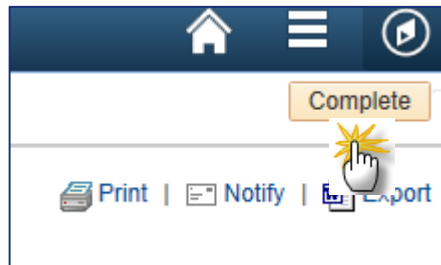
Employee Id: 100048755
Employee Name: CRISTINA VASQUEZ
Transaction: Performance Document

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

https://hrms.nychhc.org/psp/hrprd/EMPLOYEE/HRMS/c/ROLE_MANAGER.EP_APPRAISAL_STAT.GBL?Page=EP_APPRAISAL_EE&Action=U&EP_APPRAISAL_ID=292765

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

Document Completed by Facility Human Resources:



Note: UPNs must be completed by Facility HR after the employee separates but before midnight after the separation occurs.

Email received by Manager once the UPN is completed by Facility Human Resources:

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

The following request has been approved by all required approvers and the document has been finalized.

Employee Id: 100048755

Employee Name: CRISTINA VASQUEZ

Transaction: Performance Document

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

https://hrms.nychhc.org/psp/hrprd/EMPLOYEE/HRMS/c/ROLE_MANAGER.EP_APPRAISAL_STAT.GBL?Page=EP_APPRAISAL_EE&Action=U&EP_APPRAISAL_ID=292749

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

Questions, Comments, Concerns?

