Using Profile Management to Feed ePerformance – Performance Reviews are FUN for Everyone But HR

Session #26277
March 23, 2009

Anaheim, California
Your Presenter

- Leslie Fennell
  - Florida State University, ERP Analyst
  - 6 years PeopleSoft HCM
  - 12 years HR/Payroll/Reporting
  - 11 years University Budgeting and Accounting
Florida State University

...is a premier, comprehensive, graduate research university, with both law and medical schools.

- Over 39,000 students
- Over 14,000 employees
- Over 13,000 biweekly paychecks
- Over $18 million in biweekly payroll
Located in Tallahassee, Florida, the state capitol; 20 miles south of the Georgia state line and less than 70 miles from the beach.
FSU and Oracle

- Financials 8.9 (upgrading to 9.0 in April 2009)
- HCM 9.0
- Enterprise Portal
- Enterprise Performance Management (Data Warehouse)
  - Live on FIN 8.4 in July, 2004; upgraded to FIN 8.9 November, 2006
  - Live on HR 8.8 in December, 2004; upgraded to HCM 8.9 in April, 2006; upgraded to 9.0 September 2008
FSU is using job code competencies (KSA’s) and position duties and responsibilities from the position profiles in the Profile Management module to feed the individual performance documents for each non-faculty employee in ePerformance. This results in reviews that are more closely aligned with position descriptions and helps ensure that those items are kept up to date. It also allows HR to define behavioral expectations for all employees.
Did You Know?

March is.....

National Performance Review Month
Agenda/Contents

- Set Up – Building Blocks
  - Profile Management
  - ePerformance
- Our ePerformance Task Force
- HR Home Team Set Up and Prep Work
  - Update Position Descriptions with essential functions
  - Assign proficiency levels to competencies (job codes are all at ‘basic’)
Our Building Blocks – Set Up

- Profile Management Piece
  - Content Types for ePerformance
    - FSU Behavioral Expectations
    - Competencies
    - Responsibilities
    - Goals and Objectives
      - Evaluate for Current Year
      - Establish Goals and Objectives for Next Year
  - Content Items for ePerformance
Our Building Blocks – Set Up

- Profile Management Piece, (cont’d)
  - Rating Models
  - Profile Types
    - Job code (delivered ROLE)
    - Position (delivered JOB)
    - Person
  - Profile Identity Options – link a profile to a “something”
  - Instance Qualifiers – did the evaluation come from employee (self) or manager?
Our Building Blocks – Set Up

- ePerformance Piece
  - Section Definitions
  - Document Roles
  - Document Types
  - Template Definition
  - Clone Template Definition
  - Language Checker
How We Got Here…

- Summer of 2007
  - Established an Evaluation Task Force
  - Picked a Pilot Group (50) to establish new criteria
  - Realized Position Descriptions needed lots of updating
- Decided to wait for 9.0 ePerformance
- Summer 2008 - Pilot Group was evaluated on paper using the new criteria
Coming This Summer…

- Original 50 will be done totally in ePerfomance August 2009
- Wave 2 (170+) will be introduced to the new process
  - Traditional Paper Evaluation for 2008-09
  - Review FSU Behavioral Expectations
  - Review responsibilities, competencies and competency levels
  - Establish goals for 2009-10
# Task Force Criteria

## Framework Components

<table>
<thead>
<tr>
<th>Universal Behavioral Expectations: Value based behavioral competencies expected of everyone at FSU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position Duties: Essential Functions of the Job as described in Position Description</td>
</tr>
<tr>
<td>Competencies: Essential technical, behavioral, and conceptual skills, ability and experience needed to effectively perform position duties at the desired level</td>
</tr>
<tr>
<td>Goals and Objectives (Business &amp; Career): Business: Goal expectations for the upcoming year based on projects, program outcomes, strategic plans, initiatives Career: Progress on career development</td>
</tr>
</tbody>
</table>

## Criteria Addressed

| Clear expectations of FSU values |
| Accountability for behaviors |
| Chance to adjust, correct, and prevent behavior that doesn’t align with FSU values |
| Performance evaluation is aligned with Position Description |
| Clear expectations of Job Duties |
| Assuring Job Duties are up-to-date |
| Identifies work skills that must be maintained |
| Chance to adjust skills for technical or knowledge change for job performed |
| Identifies individuals with advanced skills or those who need improvement |
| Identifies major tasks that contribute to organizational/career success |
| Identifies major accomplishments towards the tasks mentioned above |
| Can be used to support reward for the employee |
## Task Force Criteria (Continued)

<table>
<thead>
<tr>
<th>Usability/Reporting</th>
<th>Criteria addressed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsibilities and duties and</td>
<td>Auto loaded from position profile</td>
</tr>
<tr>
<td>competency loaded automatically</td>
<td>Upcoming goals are stored in person profile (accessible to employee) and automatically uploaded to following year’s performance evaluation</td>
</tr>
<tr>
<td>Goals and Objectives accessible to</td>
<td>Saves time in pulling materials (position description, evaluation form etc.)</td>
</tr>
<tr>
<td>employee</td>
<td>Intuitively designed-screen rolls downward with drop downs. Comment Box at the end of each section.</td>
</tr>
<tr>
<td>Reduction in preparing for a</td>
<td>Definitions are provided for scales</td>
</tr>
<tr>
<td>performance evaluation</td>
<td>Will help monitor the number of returns resulting in increased completion rates</td>
</tr>
<tr>
<td>Ease of use</td>
<td></td>
</tr>
<tr>
<td>Definitions provided</td>
<td></td>
</tr>
<tr>
<td>Reporting – ensures data integrity</td>
<td></td>
</tr>
</tbody>
</table>
Create Content Type
Add Content Items

Content Type: FSU_UBE  FSU Behavioral Expectations
Content Item ID: UBE001

*Effective Date: 12/17/2004
*Status: Active
*Description: Organizational Commitment
*Long Description: Demonstrates a productive, ethical work style that is compliant with University and department policies and procedures.

Last Update Date/Time: 01/26/09 1:56:50PM  Updated By: AFR02
Add Content Items

- Content Type: COMPETENCY
- Content Item ID: CO0001

**Content Items Details**

- **Effective Date:** 12/17/2004
- **Status:** Active
- **Description:** Apkl of laws, rules, policy
- **Long Description:** Knowledge of and ability to interpret and apply related federal, state
- **Short Description:** CO0001
- **Category:** Knowledge
- **Rating Model:** FSU3 Competency - 4 Scale Eval
- **Last Update Date/Time:** 02/16/09 12:12:58PM
- **Updated By:** LFENNELL
Add Content Items

**Item Details**

- **Content Type:** RESP - Responsibilities
- **Content Item ID:** RE0001

**Content Items Details**

- **Effective Date:** 12/17/2004
- **Status:** Active
- **Description:**
  - Coord Activities in Career Development & Placement Services
  - Coordinates activities in Career Development and Placement Services both on and off campus as required.

**Last Update Date/Time:** 02/16/09 2:16:31PM
**Updated By:** LFENNELL
Add Content Items

Content Details:
- **Content Type:** GOAL
- **Goals and Objectives**
- **Content Item ID:** C00001

**Content Items Details**
- **Effective Date:** 01/01/2008
- **Status:** Active
- **Description:** Exceed state average job placement numbers
- **Long Description:** Exceed the state average of 75% job placement of college graduate by placing at least 85% of all FSU graduates you assist in high paying jobs.
- **Measurement:**
- **Last Update Date/Time:** 03/11/09 4:02:48PM
- **Updated By:** LFENNELL
Create Rating Models

Rating Model
- Rating Model: FSU1
- Effective Date: 12/17/2004
- Description: UBE Rating Model 3 Scale
- Short Description: UBE Model
- Status: Active

Ratings
- General
  - Rating 1: Below Satisfactory, Description: Below, Rating: 0.00, Explanation:
  - Rating 2: Satisfactory, Rating: 0.00, Explanation:
  - Rating 3: Above Satisfactory, Rating: 0.00, Explanation:
Job Code Profile

Profile Type: ROLE

*Effective Date: 12/17/2004
*Status: Active
Description: Job Code Profile
Summary: Adding a row to delivered role profile for use as a Job Code profile. Setup in this way to support integration with recruiting: use delivered JOB profile for Position Profile.

Transaction Name: 
Definition ID: 
Profile Type Usage: Non-Person
Job Code Profile

Profile Type: ROLE

Identity Options
- Effective Date: 12/17/2004
- Status: Active
- Description: Job Code Profile

Approval Req’d for Identities

Profile Identity Options
- Profile Identity Option: Job Code
  - End Profile: ✓
  - Template: ✓
  - Sys Data: □

Add Profile Identity
## Job Code Profile

### Content Section

<table>
<thead>
<tr>
<th>Content</th>
<th>Catalog</th>
<th>Duties/Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Content Type</td>
<td>FSU_SUMJOB</td>
<td>Job Code Profile</td>
</tr>
</tbody>
</table>

### Instance Qualifier Set 1

### Instance Qualifier Set 2

### Content Properties

<table>
<thead>
<tr>
<th>Properties</th>
<th>Property Attributes</th>
<th>Default Display Order</th>
<th>Refresh Properties</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field Name</td>
<td>JFM_CAT_ITEM_ID</td>
<td>Summary</td>
<td>Catalog</td>
</tr>
<tr>
<td></td>
<td>EFF_DT</td>
<td>Effective Date</td>
<td>Catalog</td>
</tr>
<tr>
<td></td>
<td>EFF_STATUS</td>
<td>Status as of Effective Date</td>
<td>Catalog</td>
</tr>
<tr>
<td></td>
<td>JFM_CAT_TYPE</td>
<td>Content Type</td>
<td>Catalog</td>
</tr>
<tr>
<td></td>
<td>JFM_TEXT1325_1</td>
<td>Description</td>
<td>Profile</td>
</tr>
</tbody>
</table>

### Security

<table>
<thead>
<tr>
<th>Role</th>
<th>Allow Update</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrator</td>
<td>✔️</td>
</tr>
<tr>
<td>Employee</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td></td>
</tr>
</tbody>
</table>

Add Property

Add Role
Job Code Profile

Profile Type: ROLE

Effective Date: 12/17/2004

Status: Active

Description: Job Code Profile

Tab Name: Qualifications

Tab Order: 10

Content Sections:
- Education/Experience
- Degrees
- Licenses & Certifications
- Tests/Examinations
- Competencies
- Memberships

Add Content Section: +
Add Sub-section: +
Job Code Profile
Position Profile

Profile Type: JOB

*Effective Date: 12/16/2004
*Status: Active

*Description: Position Profile

Summary: Position Profile - store Position description information.
Association: ePerf template
Identity: Position Data
Transactions undefined

Transaction Name: 
Definition ID: 
Profile Type Usage: Non-Person
### Position Profile

**Profile Type:** JOB

**Content**

- **Effective Date:** 12/16/2004
- **Description:** Position Profile

**Summary**

- **Tab Name:** Competencies
- **Tab Order:** 30

**Content Sections**

- **Section Name:** Competencies
- **Required:** True
- **Move To Tab:** Competencies
- **Order:** 10

**Responsibilities**

**Competencies**

**Qualifications**

**TEST - GO**
Position Profile
Position Profile

<table>
<thead>
<tr>
<th>Attributes</th>
<th>Identities</th>
<th>Content</th>
<th>Associations</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Profile Type:</strong> JOB</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Content**

<table>
<thead>
<tr>
<th><em>Effective Date:</em> 12/16/2004</th>
<th><em>Status:</em> Active</th>
</tr>
</thead>
</table>

**Summary**

<table>
<thead>
<tr>
<th><em>Tab Name:</em> Qualifications</th>
<th><em>Tab Order:</em> 40</th>
</tr>
</thead>
</table>

**Content Sections**

- Education/Experience
- Degrees
- Licenses & Certifications
- Tests/Examinations
- Memberships
- Language Skills

Add Content Section
Add Sub-section

Reorder Content

View All Sections

TEST - GO
Position Profile

![Image of Position Profile tool interface]
Position Profile

Profile Type: JOB

Association Options

*Effective Date: 12/16/2004
*Status: Active

*Description: Position Profile

Profile Association Options

*Profile Association Option

ePerformance Template

Add Profile Association
ePerformance Section Defns

Section Type: FSU USE

Section Definition Detail
- Effective Date: 12/17/2004
- Status: Active
- Description: FSU Behavioral Expectations

Section
- Rate
- Preliminary Rating
- Weight
- Minimum Weight: 0
- Weight: 0
- Special Processing: None

Items
- Enable Items
- Free-Form Allowed
- Rate
- Use Section Rating Model
- Weight
- Mandatory
- Description
- Due Date
- Supports
- Ownership
- Percentage Completed

Prompt Table: EP_J_CAT_ITEM_1
- Content Type: FSU Behavioral Expectations
- Target Rating
- Add Items - Establish Criteria
- Minimum Weight
- Critical
- Measures
- Reminder Date
- Status

Sub-Items
- Enable Sub-Items
- Free-Form Allowed
- Description

Profile Management
- Initialize from Profile
This can help divide sections of a longer or more complex presentation.
Template Definition

Document Type: ANPPERF  ANP Performance Evaluation
Template ID: ANPPERF  Effective Date: 01/01/2009

*Description: ANP Performance Evaluation
*Status: Active

Participation

<table>
<thead>
<tr>
<th>Role</th>
<th>Evaluation</th>
<th>Document Due Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td></td>
<td>45</td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td>30</td>
</tr>
</tbody>
</table>

After Period End Date
Template Definition

Document Type: A&P PERF  A&P Performance Evaluation
Template ID: A&P PERF  Effective Date: 01/01/2009

Manager Evaluation
*Review Process: No Approval, EE Review Held
Definition ID:
View Average Rating: □ Manager  □ Employee
□ Cancel Outstanding Evaluations

Evaluation Rules
*Rounding Rule: Standard  Decimal Places: 0
□ Calculate Ratings  *Map Method: Nearest
☑ Language Checker
Template Definition

[Image of a template definition interface with various fields and options for defining sections, items, and profile management.]
Template Definition

Document Type: A&P PERF  A&P Performance Evaluation
Template ID: A&P PERF  Effective Date: 01/01/2009

Section: FSU Behavioral Expectations

Section Items

Item ID:  
Title:  
Description:  
Rating Model:  
Mandatory
Template Definition

Document Type: ANPPERF  ANP Performance Evaluation
Template ID: ANPPERF  Effective Date: 01/01/2009

Section: FSU Behavioral Expectations
Load Content from Profile

Section Items

Item ID: UBE001
Title: Organizational Commitment
Description: Demonstrates a productive, ethical work style that is compliant with University and department policies and procedures.
Rating Model: FSU1
Mandatory
UBE Role Definitions

<table>
<thead>
<tr>
<th>Section Roles</th>
<th>Rate/Weight</th>
<th>Section</th>
<th>Item</th>
<th>Profile Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Role</td>
<td>Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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<th>Section</th>
<th>Item</th>
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<tbody>
<tr>
<td>*Role</td>
<td>Manager</td>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>

<table>
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<th>Rate/Weight</th>
<th>Section</th>
<th>Item</th>
<th>Profile Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Role</td>
<td>Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Competency Section Definitions

![Image of competency section definitions](image)

### Sections
- **Rate**
- **Preliminary Rating**
- **Weight**
  - Minimum Weight: 0
  - Weight: 0
- **Special Processing**: None

### Items
- **Enable Items**
- **Free Form Allowed**
- **Rate**
- **Use Section Rating Model**
- **Weight**
- **Mandatory**
- **Description**
- **Due Date**
- **Supports**
- **Ownership**
- **Percentage Completed**

### Sub-items
- **Enable Sub-Items**
- **Free Form Allowed**
- **Description**

### Profile Management
- **Initialize from Profile**
- **Profile Type**: Position Profile

### Calculation Method
- **Average**

### Rating Model
- **FSU3**

### Prompt Table
- **EP_J_CAT_ITEM_1**

### Content Type
- **Competencies**
  - **Target Rating**
  - **Critical**
  - **Measures**
  - **Reminder Date**
  - **Status**
Competency Role Definitions

Section Roles

<table>
<thead>
<tr>
<th>Rate/Weight</th>
<th>Section</th>
<th>Item</th>
<th>Profile Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Role</td>
<td>Rate</td>
<td>Sub-item</td>
<td>Override</td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Manager:

- View: Not Used
- Results Writer: Not Used
- Development Tips: Not Used
2009 Goals Section
Goals for Next Year

<table>
<thead>
<tr>
<th>Sections</th>
<th>Calculation Method</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rate</td>
<td>Rating Model</td>
</tr>
<tr>
<td>Preliminary Rating</td>
<td>Minimum Weight:</td>
</tr>
<tr>
<td>Weight</td>
<td>Weight:</td>
</tr>
<tr>
<td></td>
<td>Special Processing</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Items</th>
<th>Prompt Table</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable Items</td>
<td>Goals and Objectives</td>
</tr>
<tr>
<td>Free-Form Allowed</td>
<td>Target Rating</td>
</tr>
<tr>
<td>Description</td>
<td>Add Items - Establish Criteria</td>
</tr>
<tr>
<td>Due Date</td>
<td>Minimum Weight:</td>
</tr>
<tr>
<td>Supports</td>
<td>Critical</td>
</tr>
<tr>
<td></td>
<td>Measures</td>
</tr>
<tr>
<td></td>
<td>Measures</td>
</tr>
<tr>
<td></td>
<td>Reminder Date</td>
</tr>
<tr>
<td></td>
<td>Status</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sub-Items</th>
<th>Prompt Table</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable Sub-Items</td>
<td></td>
</tr>
<tr>
<td>Free-Form Allowed</td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Profile Management</th>
<th>Profile Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initialize from Profile</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Section Roles</th>
<th>Rate/Weight</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role</td>
<td>Rate Section</td>
</tr>
<tr>
<td></td>
<td>Rate Item</td>
</tr>
<tr>
<td></td>
<td>Rate Sub-Item</td>
</tr>
<tr>
<td></td>
<td>Override Rating</td>
</tr>
<tr>
<td></td>
<td>Numeric Weight</td>
</tr>
<tr>
<td></td>
<td>Weight</td>
</tr>
<tr>
<td></td>
<td>Manager</td>
</tr>
</tbody>
</table>
Language Checker Suggestion

Suggestion ID: 00101
*Content Supplier: Customer Defined

Language Suggestions:
When evaluating employees, care should be used when FMLA is mentioned. Please contact Employee and Labor Relations for guidance concerning this topic.

Proper Usage:
It is never proper to mention FMLA in an employee's evaluation. Please contact Employee and Labor Relations for guidance concerning this topic.

Incorrect Usage:
FMLA should never be mentioned in an employee's evaluation. Please contact Employee and Labor Relations for guidance concerning this topic.
When evaluating employees, care should be used when FMLA is mentioned. Please contact Employee and Labor Relations for guidance concerning this topic.
Position Profile

Responsibilities

Non-person Profile

Profile: 121841
*Profile Type: JOB
*Description: Apprentice Stud Affairs Coord
Owner:
Comments:

Profile Usage: End/Final/Job
Profile Actions: , Select Action...

Summary  Responsibilities  Competencies  Qualifications  TEST - GO

* Responsibilities (Approval Not Required)
Responsibility  *Effective Date  % Time Allocation
Coord Activities in Career Development & Placement Services  01/01/2009  33
Liaison with outside employers for job placement  01/01/2009  33
Coordinates special events and job fairs  01/01/2009  34

* Add New Responsibilities

Profile Identities (Approval Not Required)
Profile Identity Option  Effective Date  Search  Key  Description  Workflow Status
Position Data  01/01/2009  Search  Key  1  Apprentice Student Affairs Coord  Approved

* Add Profile Identity
Position Profile

Competencies
Position Profile

Current Year Goals

Non-person Profile

Profile: 121841
*Profile Type: JOB
*Description: Apprentice Stu Affairs Coord
Owner: 
Comments: 

Profile Usage: End / Final / Job
Profile Actions: 

Import/Syndicate Content  Syndication Source and Targets  Remove Syndicated Content

Summary Responsibilities Competencies Qualifications TEST - GO

Goals and Objectives (Approval Not Required)

Goal/Objective
Exceed state average job placement numbers
Schedule 3 Conference Presentations

Add New Goals and Objectives

Summary Responsibilities Competencies Qualifications TEST - GO

Profile Identities (Approval Not Required)

Profile Identity Option Effective Date Search Key 1 Description Workflow Status
Position Data 01/01/2009 Search 00080508 Apprentice Student Aff Coord Approved
By August 2009

Let’s see an evaluation and why our managers want to be in Wave 2....
Questions?
Contacts

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  - ERP Analyst for HR, Payroll, Commitment Accounting
  - Enterprise Resource Planning
  - Florida State University
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This presentation and all Alliance 2009 presentations are available for download from the Conference Site.

Presentations from previous meetings are also available.