



***MCP/ASR***  
***Performance Excellence Program***  
***Web Portal Guidebook***

**Department of Human Resources**  
Chester C. Christie, Director  
City Hall, Suite 311  
(614) 645-7206

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## Getting Started Overview

The MCP/ASR PEP web portal is an efficient tool for managing individual performance management. It covers both annual and probationary evaluations, and is automatically updated each pay period. The web portal is to be used in conjunction with the handbook and other program resources. For more information visit our website at:

[http://intranet/HumanResources/mcp\\_asr.htm](http://intranet/HumanResources/mcp_asr.htm)

*Note: For Technical problems or support call the Help Desk at 645-5758. For process issues, contact your departments HR Rep or the City's Compensation Manager (614-645-0293)*

### **Web Access Information:**

<https://qwars316csr/HR/Evaluations/>

This is a secure website, and can only be accessed from a City location

### **Log-in:**

In order to log-in you will need a pin. Your social security number will act as your pin. When keying in your social security number, only dots will appear on the screen. Your social security number was selected as the pin to protect employee confidentiality.

While logging in, you will also be required to type in the evaluation year. Going forward, this will allow you to access historical information.

## Dashboard

The Dashboard will act as your starting point and your home page in this process. It will allow you to navigate around the system. The links on your Dashboard are determined by your role which can be any of the following or a combination thereof:

-  **Manager**
-  **Employee**
-  **Reviewer**
-  **Appointing Authority**
-  **Department HR Rep**

*Note: Selecting the "Dashboard" tab will allow you to return to the home page of the PEP program should you get lost in navigating the system.*

On the Dashboard you will have the following options to choose from:

**LOG-OUT** -Will close the Dashboard and take you back to the password entry.

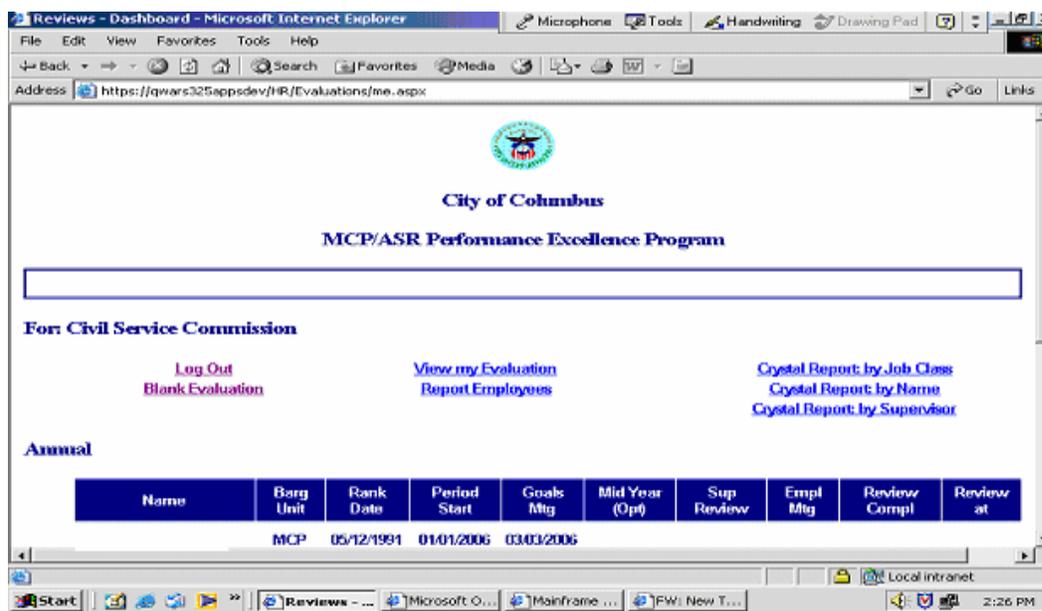
**BLANK EVALUATION** - Will take you to a blank evaluation screen.

**VIEW MY EVALUATION** - Will allow you to view your evaluation. You can only view the evaluation if it is not in the reviewing process. If you try to view the evaluation while in the reviewing process you will receive the notice "Evaluation in Progress."

**REPORT EMPLOYEES** – Will only appear if you have direct reports.

**CRYSTAL REPORT** - Under Crystal Reports you will only be able to view your direct reports. There are three ways to view the reports:

- CRYSTAL REPORT BY JOB CLASS - Alphabetical order by job classifications
- CRYSTAL REPORT BY NAME - Alphabetical order by name
- CRYSTAL REPORT BY SUPERIOR - Alphabetical order by supervisor

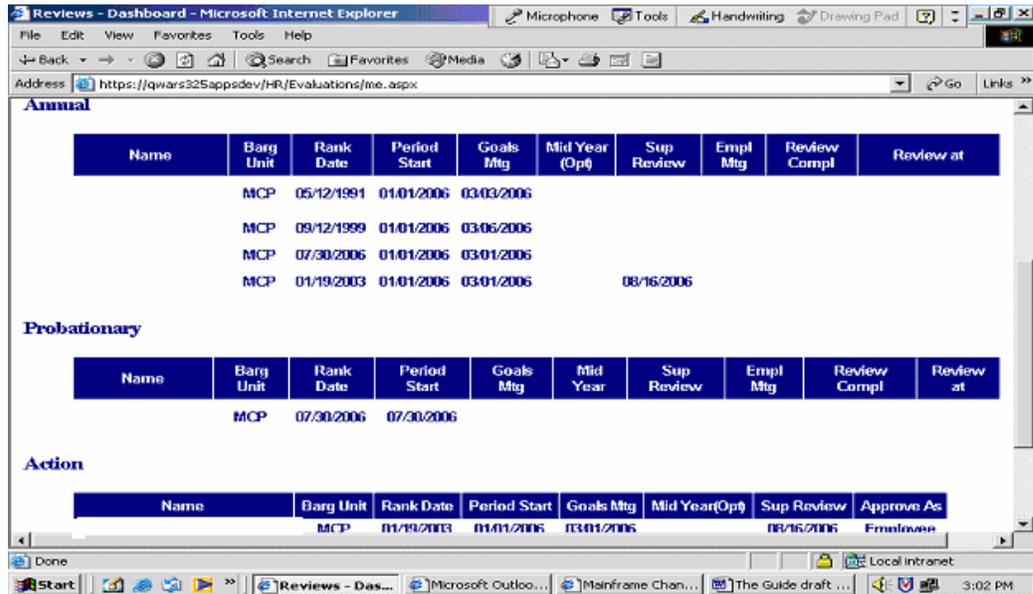


The middle section of the Dashboard will display:

**ANNUAL** - Will show direct reports who are currently included in the annual review process

**PROBATIONARY** - Will show direct reports who are in a probationary period

**ACTIONS** – Will show those who have an action in progress or needs an action taken



The bottom section of the Dashboard will display the Legend:

**Overdue**

Indicates that a step is past due in the PEP process

**Coming up to deadline**

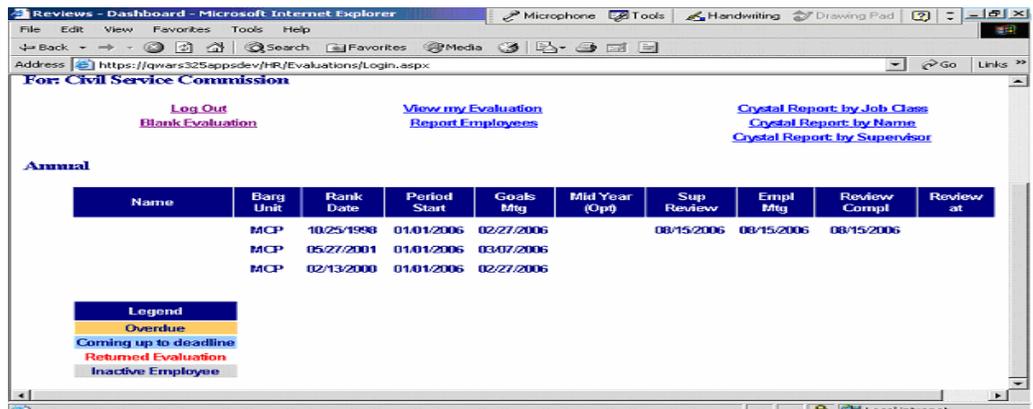
Indicates an action step deadline is growing near

**Returned Evaluation**

Indicates that the last approver "disapproved" the evaluation rating and comments

**Inactive Employee**

Indicates that the employee has either left the City or has changed classification/ program department that is outside of the PEP process



## Performance Planning

### Tab 1: Performance Goals

#### Step One: Setting the Performance Goals

1. Once a meeting has taken place between the manager and the employee and both parties have established and agreed upon the performance expectations/goals and what the employee will be evaluated on, the next step will be to add the goals to PEP
2. Click on **Add** to input the "Goals."

The screenshot shows a web browser window titled "Reviews - Main Page - Microsoft Internet Explorer". The address bar shows the URL: <https://qvars325appsdev/HR/Evaluations/display.aspx?V=432>. The page content includes the following fields and buttons:

- Employee Name:
- Classification Title:
- Date of Rank:
- Evaluation Period: From: 1/1/2006 To: 12/31/2006 Evaluation Type: Annual
- Department: Division:
- Buttons: Go to Dashboard, Print Review
- Tabs: Performance Goals (selected), Competencies, Mid Year, Approvals
- Section Header: Performance Goals
- Table with columns: Objectives or Key Job Responsibilities (What you will do), Measurement/Timing (How will you quantify, verify, or observe success? What critical milestones should be considered?), Outcomes (Summary of progress to date), Results
- Buttons: Clone Goals, Add, Reset

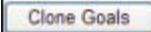
Note: The reset button **Reset** is used to clear out the area that you are working in. Reset can only be used before you save a document.

#### Step Two: Adding the Goals

When adding goals in the "Objective or Key Job Responsibilities" column, be sure to identify the "Measurement/Timing" criteria as well. Click on **Save** to save the goal added.

1. To add additional goals to PEP, click on **Add**. Remember to click on **Save** after adding each goal.



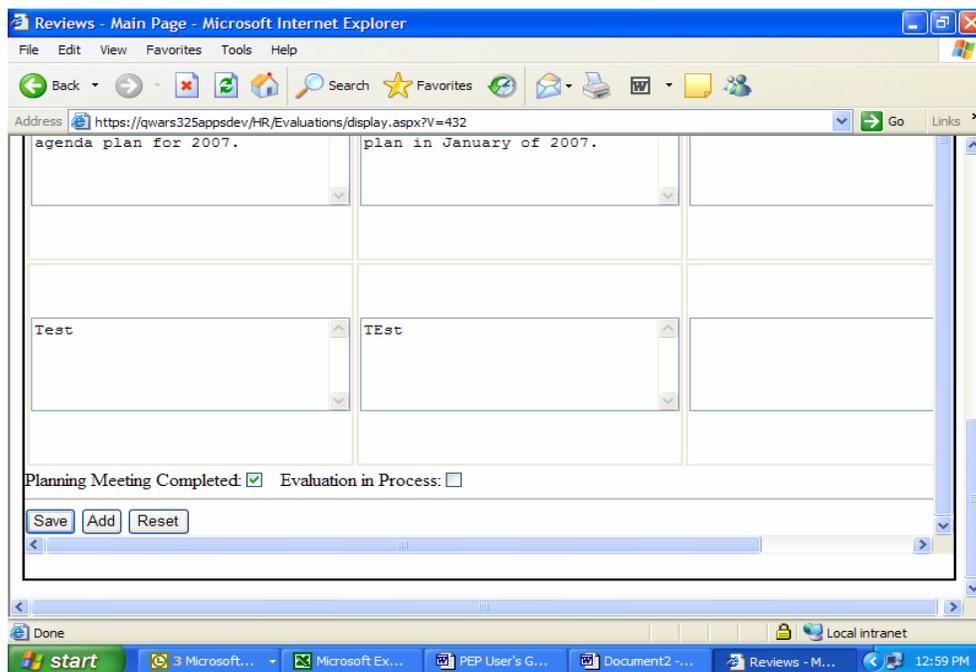
Note: The “Clone Goals” feature  will allow you to copy goal from another employee’s evaluation and paste it into the current “Objective or Key Job Responsibilities” area. See Appendix A for details.

**Step Three: Reviewing the Competencies (Competencies Tab)**

1. Discuss with the employee what “Successful” performance would be on each competency including the leadership competencies if applicable.
2. Click on the “Competencies” tab and scroll down to the leadership section. If this section does not apply to your employee, click “Not Applicable” for both sections and click .

**Step Four: Complete the Planning Process:**

1. After all goals have been input and discussion has taken place with the employee, go to the bottom of the page and select “Planning Meeting Completed” and then . This function will start the process for the next step in PEP.



## Mid-Year Review

Mid-Year information is mandatory for employees who are in a probationary status. For annual employees, the mid-year review will be optional. The Mid-Year section will be used for making comments on the progress that the employee is making based on the goals that were set at the beginning of the year or PEP cycle.

Reviews - Main Page - Microsoft Internet Explorer  
Address <https://qwar325aappsdev/HR/Evaluations/display.aspx?V=432#> Go

### Employee Data

Employee Name:  
Classification Title:  
Date of Rank:  
Evaluation Period: From: 1/1/2006 To: 12/31/2006 Evaluation Type: Annual  
Department: Division:

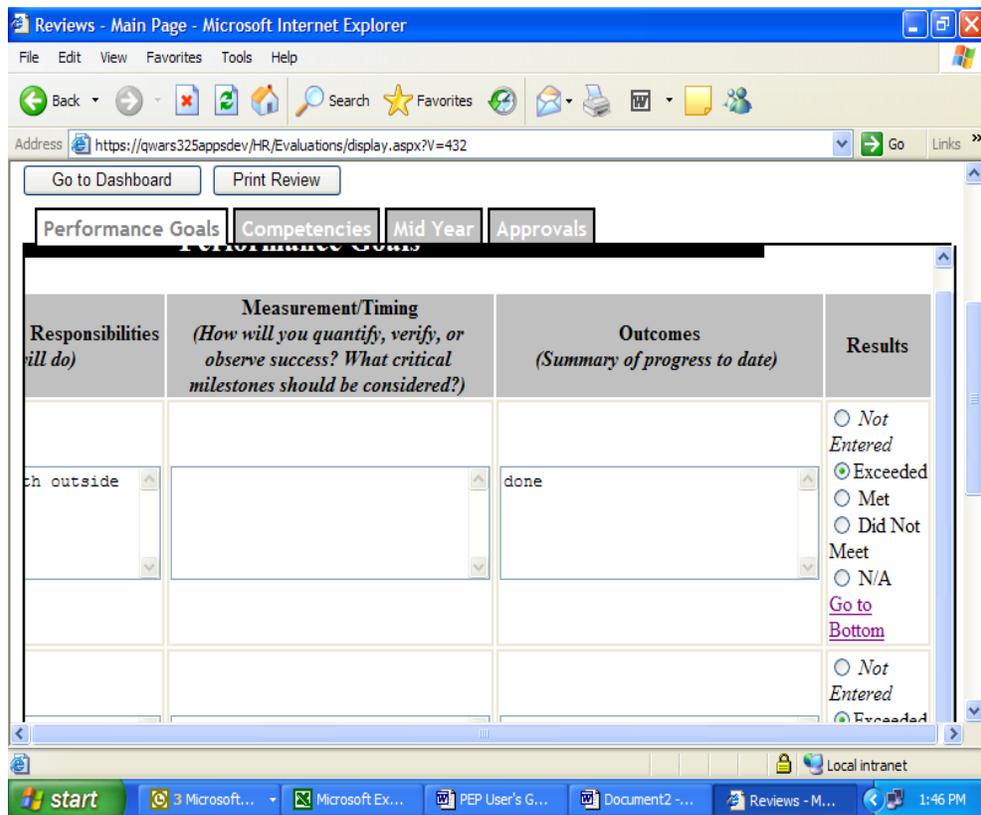
## Annual Review

### Tab 1: Performance Goals

To begin the review process, you will need to start with the “Performance Goal” tab and complete the “Outcomes” and “Results” sections. Be sure to activate the “Evaluation in Progress” lock feature at the bottom of the goals page by clicking on the box. By doing this, it will only allow the reviewers (i.e. Manager, Appointing Authority and HR) to review the evaluation while in progress. If the employee should try to review the evaluation while in progress, the employee would receive an “Evaluation in Progress” message, and be unable to view the any ratings or comments in place at that time.

#### Step One:

1. Click on the “Performance Goal” tab.
2. For each “Outcomes” section, be sure to complete the “Results” section. Once all “Outcomes” and “Results” have been completed, click on “Evaluation in Progress” and then click .



Responsibilities (will do)	Measurement/Timing (How will you quantify, verify, or observe success? What critical milestones should be considered?)	Outcomes (Summary of progress to date)	Results
ch outside		done	<input type="radio"/> Not Entered <input checked="" type="radio"/> Exceeded <input type="radio"/> Met <input type="radio"/> Did Not Meet <input type="radio"/> N/A <a href="#">Go to Bottom</a> <input type="radio"/> Not Entered <input checked="" type="radio"/> Exceeded

**Tab 2: Competencies**

**Step Two:**

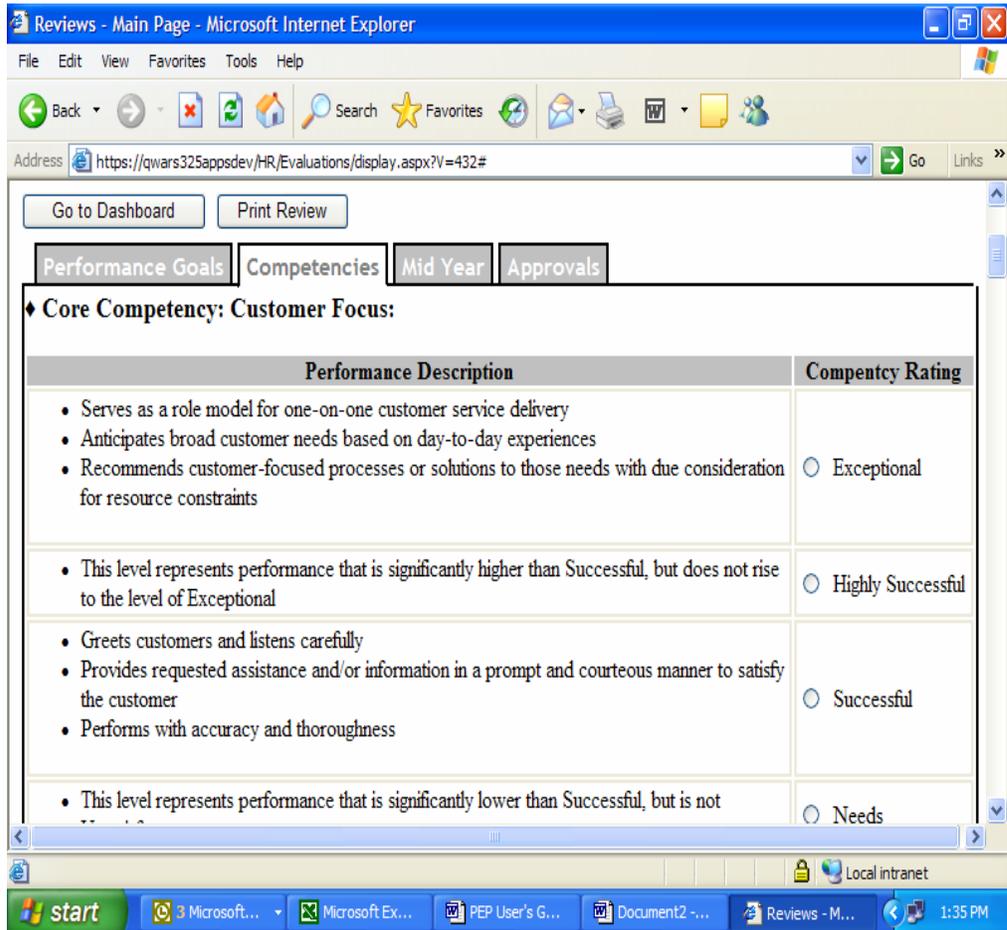
Under the “Competencies” tab there will be four Core Competencies that will apply to all PEP employees, along with two Leadership Competencies that may or may not apply. When completing this section, you are required to rate and add comments for each section that applies.

The Core Competencies are:

- ❖ Customer Focus
- ❖ Accountability for Results
- ❖ Continuous Improvement
- ❖ Culture of Occupational Safety

The Leadership Competencies (if applicable) are:

- ❖ Managing Performance
- ❖ Managing Resources



**Step Three: Completing the Evaluation Section:**

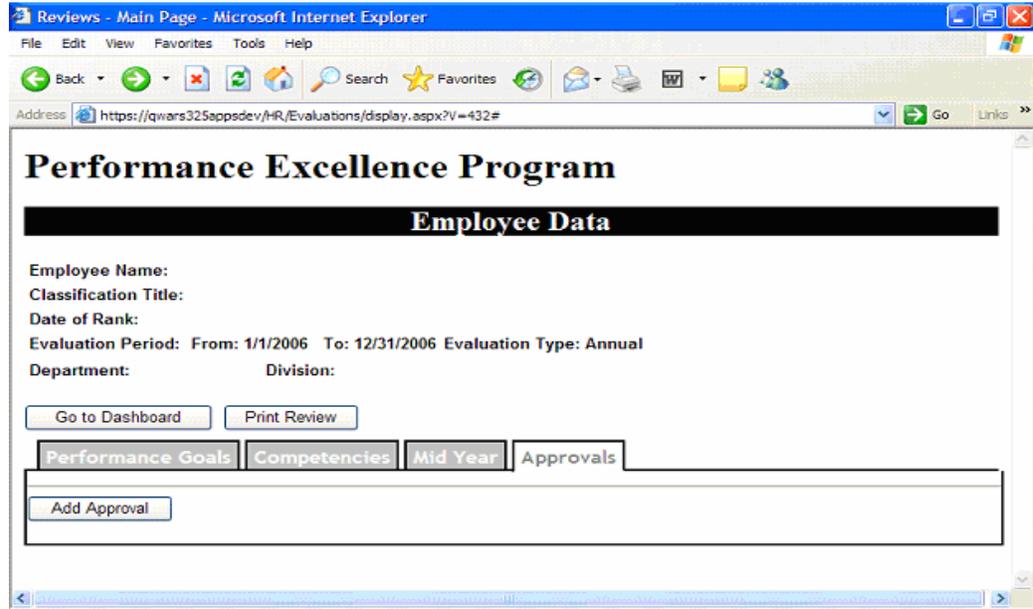
Once the evaluation/rating and comments have been added, be sure to click



**Approval**

**Tab 4: Approval:**

**Step One:** Click on “Add Approval”

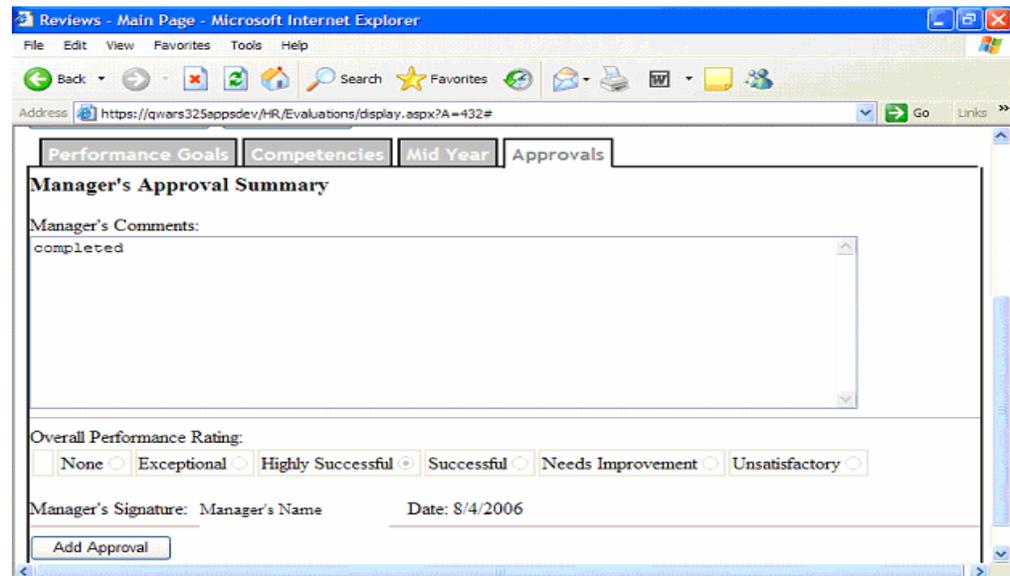


Note: Determine an overall rating. Be sure to review the previous tabs “Performance Goals” and “Competencies.”

**FIRST LEVEL OF APPROVAL: “MANAGER”**

**Step One:** Complete comment sections to support your evaluation rating.

**Step Two:** Select your rating and click **Save**



**Step Three:** If the comments and evaluation rating are correct and complete, click “Save and Forward.” “Save and Forward” will move the evaluation to the next level of review for approval.

**Note:** By selecting “Save”, this allows you to review the entries made. If any changes need to be made they can be corrected before forwarding the evaluation onto the next approval level.

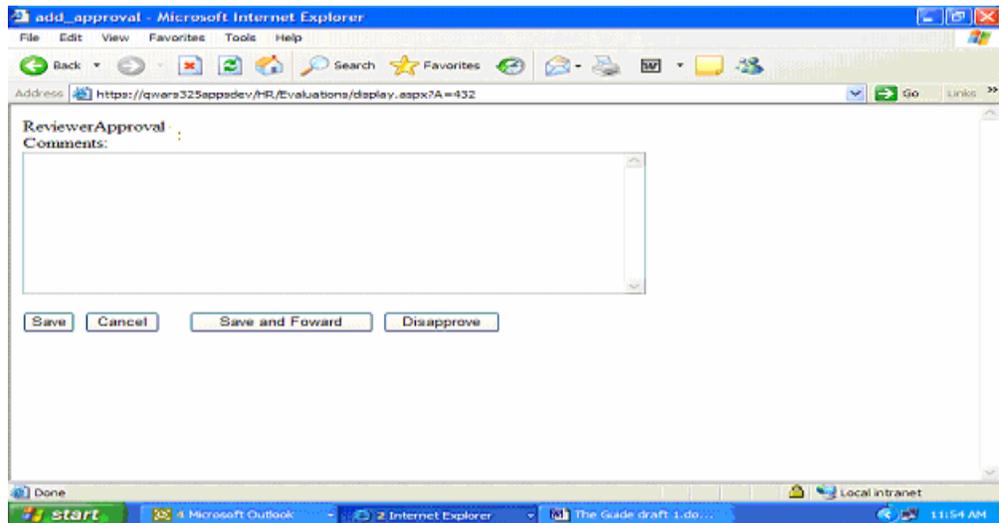
Once you have selected “Save and Forward” the system will date stamp your name, date, and reviewer title. From here the evaluation will move to the next level in the approval process.

**Note:** If an error is made and you have already clicked “Save and Forward”, you will need to contact the next level approver to request that the evaluation be sent back to you. The approver will need to click “disapprove”. This will automatically send the evaluation back to the last approver.

### **SECOND LEVEL OF APPROVAL: “REVIEWER”**

*(This level may or may not apply depending on reporting hierarchy)*

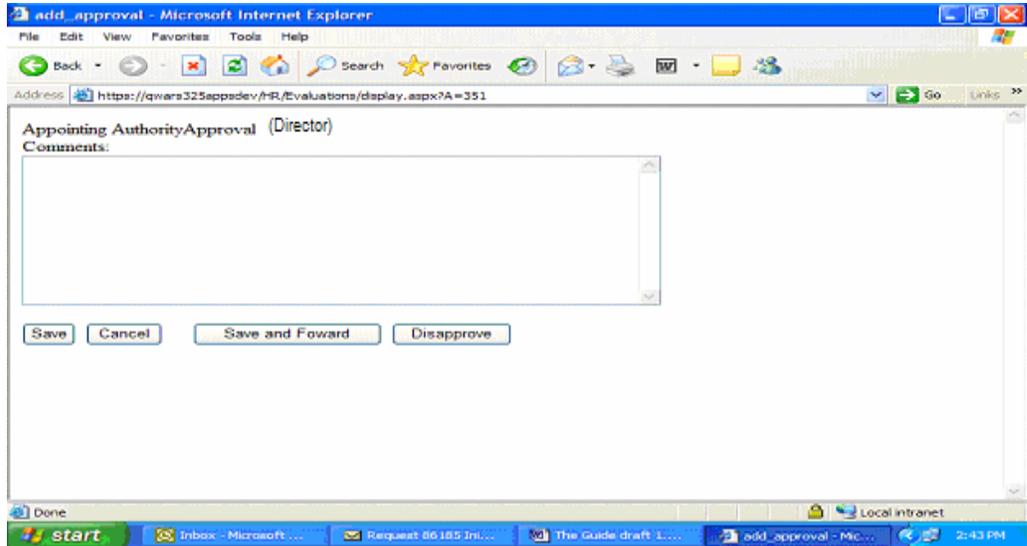
Step Two: At this step you could choose to add your comments to support the evaluation rating and select “Save and Forward,” or you could disapprove the rating. If the evaluation is “Disapprove,” the evaluation will be returned to the “Manager” along with your comments.



**Note:** You can choose to save this section for a later time by simply clicking on “Save”. This will allow you to save the information that you have already entered for a later date to finish.

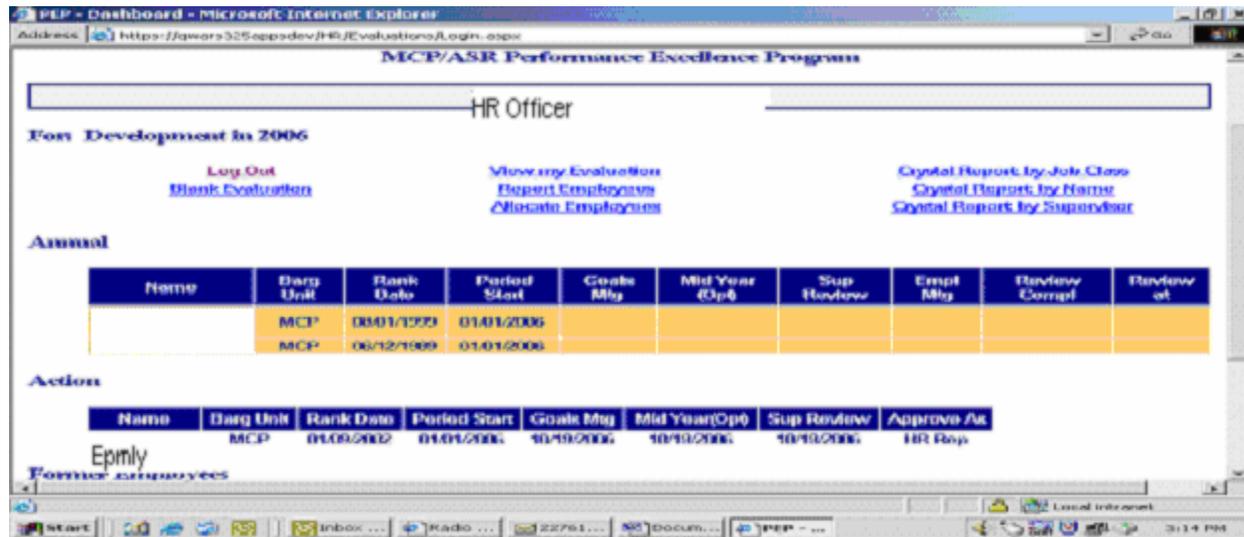
**THIRD LEVEL OF APPROVAL: "APPOINTING AUTHORITY"**

Step One: Same as "Step Two" at second level.



**Final Level of Approval: Department HR Officer**

**Step One:** Once the meeting between the manager and the employee has occurred and any comments have been added, the next and final step will be to **“Save and Forward”**. By doing this, it will return to the Human Resources Officer for final approval. The Human Resources Officer will receive the final approval under their **“Action”** area on their dashboard.



**Step Two:** Human Resources Officer will review all information entered and review comments from employee. If the comments made by the employee raise any type of concern, the evaluation will be re-routed to the manager or appointing authority for view and the evaluation will need to go back through the steps. If all of the information has been reviewed and no concerns raised, then final approval will be given by HR Officer clicking on **“Finalize Evaluation”**. Once this has been done the manager’s dashboard with **“Reviewed Completed Field”** will show the date.

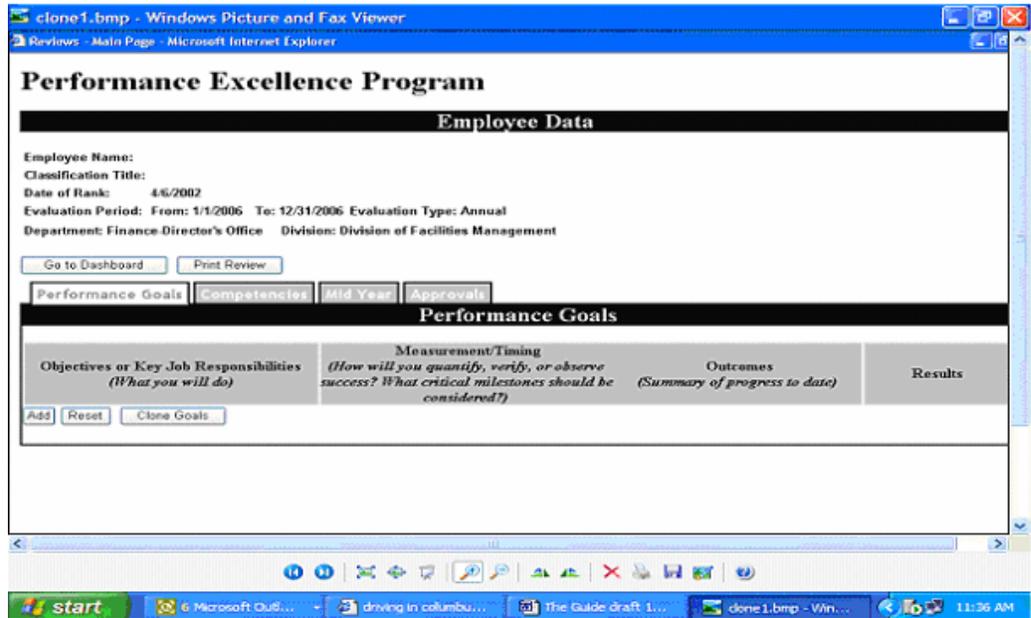


Two copies should be printed out, one for the employee and the other for the employee’s file. This will complete the annual performance review process.

**Appendix**

**Cloning Goals**

**Step One:** Click on



**Step Two:** Key in the SS/Pin number and year of the employee you would like to clone the goals from and click . From there you can copy the goals and then paste the information into the current evaluation.

