
Mississippi Management and Reporting System

Department of Finance and Administration

MMRS MASH/Training Materials		
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**Employment Performance Appraisals
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REQUIREMENTS OF AGENCY SUPERVISORS REGARDING SUBMISSION OF PERFORMANCE APPRAISAL RATINGS IN THE STATEWIDE PAYROLL AND HUMAN RESOURCE SYSTEM:

Overview

The Performance Appraisal Review (PAR) functions of SPAHRS provide a mechanism to record and track employee ratings and appraisal periods/dates. The system conforms to the guidelines and regulations in the *Mississippi State Personnel Board Policy and Procedures Manual*. In SPAHRS, when the New Hire (Original Appointment) transaction information is recorded and approved, a **Record Performance Appraisal** screen will automatically be created to reflect the "**Appraisal Period Start**" and "**Appraisal Period End**."

A **current appraisal rating** is defined as "a rating less than 365 days but more than 90 days from the date of the last appraisal rating." In all personnel transactions **for positions under the salary setting authority of the Mississippi SPB**, the performance evaluation period begins for an employee upon entering the position, whatever date that may be, and will end one year from that date (except for employees in the probationary period of 12 months). However, a new appraisal rating is required less than one year from the last rating prior to a **Promotion; Transfer; Reclassification; Reallocation; or Demotion**.

In all personnel transactions, SPAHRS will check to see if the employee has a current appraisal rating, as defined above, at the time the transaction is entered and transmitted for approval. If the last/current appraisal rating is **less** than 90 days from the date of the last appraisal rating, the process to transmit the record for approval will not be interrupted.

If the last/current appraisal rating is **more** than 90 days from the date of the last appraisal rating, the **Record Performance Appraisal** screen will be invoked, preventing the personnel transaction from processing until a performance appraisal rating is completed for the employee (based on the current position), recorded, and approved. Then the pending personnel transaction request will be approved and the action processed.

The Mississippi SPB processes for performing personnel actions in SPAHRS follow:

Original Appointment

A **Record Performance Appraisal** screen with "**Appraisal Period Start**" and "**Appraisal Period End**" will automatically be created when the New Hire (Original Appointment) position transaction information is recorded and approved. The initial "**Appraisal Period Start**" will be the hire/position entry date. The "**Appraisal Period End**" will reflect the end of the first six months from the hire/position entry date and require that a rating and rating date be recorded in the "**Performance Rating**" and "**Appraisal Rating Date**" fields.

The second six-month appraisal period will be created as a result of recording the appraisal rating and date for the first six months. The "**Appraisal Period End**" will reflect the end of the first twelve months from the hire/position entry date.

When the second six-month appraisal period is completed and a rating of 3.00 or above is recorded on the **Record Performance Appraisal** screen, the probationary period is completed; the next "**Appraisal Period End**" is set to 365 days from the "**Appraisal Rating Date**."

Performance Improvement Plan Procedure

Should the rating of the employee fall at "Not Demonstrated" (1.0) Performance Level but lower than the "Improvement Needed" (2.0) Performance Level, a 90-day Performance Improvement Plan (PIP) period must be initiated at the time the rating is recorded and approved on the **Record Performance Appraisal** screen. At the conclusion of the 90-day Performance Improvement Plan, if the overall rating improves to level of Successful (3.0) Performance or above, the next "**Appraisal Period End**" will be set to 365 days from the "**Appraisal Rating Date**."

Re-employment for Employees Returning to State Service

When an employee returns to State Service **after Separation in Good Standing**, the same procedure discussed in **Original Appointment** above should be followed.

Intra-Agency Transfers, including Promotional, Lateral, and Demotional

For intra-agency transfers, at the time the transaction is entered and transmitted for approval SPAHRS will check to determine if the employee has a current appraisal rating, as defined above. If the last/current appraisal rating is **less** than 90 days from the date of the last appraisal rating, the transfer process to transmit the record for approval will not be interrupted.

If the last/current appraisal rating is 90 days or **more** from the date of the last appraisal rating, the **Record Performance Appraisal** will be invoked, preventing the intra-agency transfer from processing until a performance appraisal rating is completed for the employee (current position), recorded and approved. Then the pending intra-agency transfer request will be approved and the action processed.

Inter-agency Transfers

SPAHRS will check to determine if the employee has a current appraisal rating, as defined above, at the time the transaction is entered and transmitted for approval. A **warning** message will be displayed; however, the inter-agency transfer process will not be interrupted.

Reclassification and Reallocation

The same procedure discussed in **Intra-agency Transfers** above should be followed.

Re-employment for Employees Terminated through Reduction in Force

When employees who were terminated through Reduction in Force (RIF) are re-employed, the "**Appraisal Period Start**" and "**Appraisal Period End**" dates on the **Record Performance Appraisal** screen will automatically set to begin the rating period on the reemployment/position entry date.

The Occupation of the employee determines whether or not a performance appraisal rating is required. This information can be reviewed on the second panel of the Display Occupations function by using the Direct Command **OC DO**, then **PF11** to view PAR Status.

Last (or Most Current) Record Performance Appraisal Screen - General Information

When viewing or retrieving the last (or most current) **Record Performance Appraisal** record for an employee, the screen will always display agency number, position number, social security number, name of employee, occu code, occu title, PAR sort code, and date for the "**Appraisal Period Start**" and the "**Appraisal Period End.**" Other information fields, including the rating field, will be left blank for future use. It is this record that will be retrieved and then "modified" when entering a new rating.

The system will automatically create a future **Record Performance Appraisal** record each time a person is hired (refer to Original Appointment) or after an appraisal rating is completed, recorded, and approved on any personnel transaction for an employee.

Performance appraisal records may be accessed and then modified through utilizing either the **List Performance Appraisals Due** screen, the **Record Performance Appraisal** screen, the **Browse Performance Appraisals of an Employee** screen, or the **Browse Employees on PIP** screen, as follows:

List Performance Appraisals Due

The List Performance Appraisals Due screen is used to provide a list of performance appraisals due on or before the selected due date. If no date is entered, all open performance periods will be displayed. Performance appraisal records may be accessed and modified through this list.

Your Action ...	System Response ...
1. Choose EM (Employment) from the Main Menu and press ENTER.	The Employment Menu will appear.

PHFNC10	PHV8	STATEWIDE PAYROLL AND HUMAN RESOURCE SYSTEM	05/16/2016
PHIMAINU	PHIMAINM	Employment Menu	12:35 PM
Code	Description	FastPath	
EP	Maintain Employee with PIN	MEWP	
EE	Maintain Worker with WIN	MEWW	
ME	Maintain Employee/worker Information	MEWI	
MP	Maintain Payroll Information	MPAY	
PA	Process Performance Appraisal	PPAS	
R1	Miscellaneous Reports Menu1	MPR1	
R2	Miscellaneous Reports Menu2	MPR2	
MB	Miscellaneous Browsers	MPBR	
MT	Miscellaneous Employee Maintenance Programs	EMP	
Code: __			
Direct Command: _____			
Enter-	PF1---	PF2---	PF3---
Help	Main	End	
	PF4---	PF5---	PF6---
	PF7---	PF8---	PF9---
	PF10--	PF11--	PF12---
			Quit

Your Action ...	System Response ...
2. Choose PA (Process Performance Appraisal) from the Employment Menu and press ENTER.	The Process Performance Appraisal Menu will appear.

```

PHFNC10 PHV8 STATEWIDE PAYROLL AND HUMAN RESOURCE SYSTEM 05/16/2016
PHIMAINU PHIMAINM Process Performance Appraisal Menu 12:36 PM

Code Description FastPath
AD List Performance Appraisals Due ADUE
RA Record Performance Appraisal RPAP
BA Browse Performance Appraisals of An Employee
PI Browse Employees on PIP
PR Performance Appraisal Report PAREP

Code: __

Direct Command: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
Help Main End Quit
    
```

Your Action ...	System Response ...
3. Choose AD (List Performance Appraisals Due) from the Process Performance Appraisals Menu and press ENTER.	The List Performance Appraisals Due browse will appear.

```

PHFNC10 PHV8 STATEWIDE PAYROLL AND HUMAN RESOURCE SYSTEM 05/16/2016
PHOMLADB PHOMLADM List Performance Appraisals Due 12:37 PM
May 16,16 1 more >
Actions: (D,M)

Act Agency PIN Sort Code Person Name SSN Appraisal Start Appraisal End
-----

*Agency: ____ Due Date: _____ (MMDDYYYY)
Direct Command: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
Help Main End Bkwd Fwd Left Right Quit
    
```

Your Action ...	System Response ...
4. The selection criteria includes Agency Number and Due Date. Enter the selection criteria and press ENTER.	The system will display all employees with performance appraisal due dates on or prior to the date selected. Information is displayed by Agency, PIN, Sort Code, Person Name, Social Security Number, Appraisal Start and End Dates.
5. Press F11 to access the second panel of this browse.	The second panel of the List appraisals Due will appear. Information is displayed by State Hire date.

```

PHFNC10 PHV0 STATEWIDE PAYROLL AND HUMAN RESOURCE SYSTEM 05/16/2016
PHOMLADB PHOMLADM List Performance Appraisals Due 12:40 PM
< 1 more 12:40 PM
Actions: (D,M)

State Hire Dt
-----
- 12/01/2008
-
- 11/20/2013
- 11/19/2013
- 05/16/2012
-
- 07/13/2015
-

*Agency: 0160 Due Date: _____ (MMDDYYYY)
Direct Command: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
Help Main End Bkwd Fwd Left Right Quit
    
```

Your Action ...	System Response ...
6. Choose the employee on whom a rating is to be given by entering Modify under Action.	
7. Press ENTER.	The Record Performance Appraisal screen for the selected employee will appear.

```

PHFNC10 PHV0 STATEWIDE PAYROLL AND HUMAN RESOURCE SYSTEM 05/16/2016
PHOMRA1D PHOMRA1M Record Performance Appraisal 12:41 PM

*Action: = (A,C,D,M,P)

*Agency: _____ *SSN: _____
*PIN: _____ Occu: _____
Approval: _ PAR Sort Code: _____

Appraisal Period Start: _ _ _ Appraisal Period End: _ _ _
Performance Rating: _____ Appraisal Rating Date: _ _ _

*Due Date Override Reason: _____

Rater Name: _____

Concur with This Rating: _ PIP: _
Acknowledge Rating: _ PIP Start Date: _ _ _
Transmit for Approval: _

Direct Command: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
Help Main End Note Hist Quit
    
```

Your Action ...	System Response ...
<p>8. Enter the following information:</p> <p>*Agency: The system will display this information.</p> <p>*SSN: The system will display this information.</p> <p>*PIN: The system will display this information.</p> <p>Occu: The system will display this information.</p> <p>Approval: The system will display this information.</p> <p>PAR Sort Code: Performance Appraisal Review sort code- indicates how employee performance reviews are to be sorted. PAR Sort Code is a 1-4 alphanumeric code selected by the user to categorize agency positions. The system will display this information if applicable.</p> <p>Appraisal Period Start: The system will display the current appraisal period beginning date. This field cannot be modified.</p> <p>Appraisal Period End: The system will display the current appraisal ending date.</p>	

Your Action ...	System Response ...
<p>Continue entering the following information:</p> <p>Performance Rating: Enter the performance rating as x.xx (2 decimal places). Only numbers 1.00 through 4.00 are valid. NOTE: If modifying a rating on an existing record, the "Notes" screen will pop up requiring an explanation for the change in the rating.</p> <p>Appraisal Rating Date: MM DD YYYY. Must be within 14 days of the appraisal period end date.</p> <p>*Due Date Override Reason: When the Appraisal Rating Date is greater than 14 days from the Appraisal Period End, the Due Date Override Reason field is required. If choosing "Other," a brief narrative must be entered in "Notes."</p> <p>Rater Name: Enter the name of the supervisor performing the rating.</p> <p>Concur with this Rating/Acknowledge Rating: Enter "Y" to indicate concurrence with the performance appraisal rating.</p> <p>PIP: Used only for Performance Improvement Plans. When the rating is below a 2.00, this field is required.</p> <p>Acknowledge Rating: Enter "Y" to indicate acknowledgement of the performance appraisal rating.</p> <p>PIP Start Date: When a PIP entry is made, the beginning date for the plan must be entered in MM DD YYYY format.</p> <p>Transmit for Approval: Enter "Y"es to indicate that the information is complete and the request is ready to be sent for approval; enter "N"o to indicate the record is not ready for approval. If the approval has been approved but not processed, the value will be "F" - approved for a future date. If the record has been approved, it cannot be modified unless the user first withdraws the approval record.</p>	
<p>9. Press ENTER.</p>	<p>The rating will record will have been modified and the system will display the following message:</p> <p>Appraisal ###-aaaa-PIN#-# modified successfully OR Pending record has been Updated - approved by system.</p>

Record Performance Appraisal

The Record Performance Appraisals screen is used to enter or modify performance appraisal information. Information such as performance rating, rating date, name of rater, and whether the employee agrees with the rating is included.

Your Action ...	System Response ...
1. Choose EM (Employment) from the Main Menu and press ENTER.	The Employment Menu will Appear.
2. Choose PA (Process Performance Appraisals) from the Employment Menu and press ENTER.	The Process Performance Appraisals Menu will appear.
3. Choose RA (Record Performance Appraisal) from the Process Performance Appraisals Menu and press ENTER.	The Record Performance Appraisal screen will appear.

```

PHFNC10 PHV0 STATEWIDE PAYROLL AND HUMAN RESOURCE SYSTEM 05/16/2016
PHOMRA1D PHOMRA1M Record Performance Appraisal 01:02 PM

*Action: = (A,C,D,M,P)

*Agency: ____ *SSN: _____
*PIN: _____ Occu: _____
Approval: _ PAR Sort Code: _____

Appraisal Period Start: _ _ _ Appraisal Period End: _ _ _
Performance Rating: ____ Appraisal Rating Date: _ _ _

*Due Date Override Reason: _

Rater Name: _____

Concur with This Rating: _ PIP: _
Acknowledge Rating: _ PIP Start Date: _ _ _
Transmit for Approval: _

Direct Command: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
Help Main End Note Hist Quit
    
```

Your Action ...	System Response ...
4. Choose Modify and enter the following information: *Agency: The system will display this information. *SSN: The system will display this information. *PIN: The system will display this information.	
5. Press ENTER.	The system will display the current appraisal information.

Your Action ...	System Response ...
<p>6. Enter the following information:</p> <p>Occu: The system will display this information.</p> <p>Approval: The system will display this information.</p> <p>PAR Sort Code: Performance Appraisal Review sort code- indicates how employee performance reviews are to be sorted. PAR Sort Code is a 1-4 alphanumeric code selected by the user to categorize agency positions. The system will display this information if applicable.</p> <p>Appraisal Period Start: The system will display the current appraisal period beginning date. This field cannot be modified.</p> <p>Appraisal Period End: The system will display the current appraisal ending date. This field is modifiable.</p> <p>Performance Rating: Enter the performance rating as x.xx. Only numbers 1.00 through 4.00 are valid. NOTE: If modifying a rating on an existing record, the "Notes" screen will pop up requiring an explanation for the change in the rating.</p> <p>Appraisal Rating Date: MM DD YYYY. Must be within 14 days of the appraisal period end date.</p> <p>*Due Date Override Reason: When the Appraisal Rating Date is greater than 14 days from the Appraisal Period End, the Due Date Override Reason field is required. If choosing "Other," a brief narrative must be entered in "Notes."</p> <p>Rater Name: Enter the name of the supervisor performing the rating.</p> <p>Concur with this Rating/Acknowledge Rating: Enter "Y" to indicate concurrence with the performance appraisal rating.</p> <p>PIP: Used only for Performance Improvement Plans. When the rating is below a 2.00, this field is required.</p> <p>Acknowledge Rating: Enter "Y" to indicate acknowledgement of the performance appraisal rating.</p> <p>PIP Start Date: When a PIP entry is made, the beginning date for the plan must be entered in MM DD YYYY format.</p>	

Your Action ...	System Response ...
<p>Continue entering the following information:</p> <p>Transmit for Approval: Enter "Y"es to indicate that the information is complete and the request is ready to be sent for approval; enter "N"o to indicate the record is not ready for approval. If the approval has been approved but not processed, the value will be "F" - approved for a future date. If the record has been approved, it cannot be modified unless the user first withdraws the approval record.</p>	
<p>7. Press ENTER.</p>	<p>The rating will record will have been modified and the system will display the following message:</p> <p>Appraisal ###-aaaa-PIN#-# modified successfully OR Pending record has been Updated - approved by system.</p>

Browse Performance Appraisals of an Employee

The appraisal ratings for an employee may be viewed on the **Browse Performance Appraisals of an Employee** screen. The appraisal rating records are retained in descending order (last one first) by agency number and position number (PIN).

Your Action ...	System Response ...
<p>1. Choose EM (Employment) from the Main Menu and press ENTER.</p>	<p>The Employment Menu will appear.</p>
<p>2. Choose PA (Process Performance Appraisal) from the Employment Menu and press ENTER.</p>	<p>The Process Performance Appraisal Menu will appear.</p>
<p>3. Choose BA (Browse Performance Appraisals of an Employee) from the Process Performance Appraisals Menu and press ENTER.</p>	<p>The Browse Performance Appraisals of an Employee screen will appear.</p>

```

PHFNC10 PHV0 STATEWIDE PAYROLL AND HUMAN RESOURCE SYSTEM 05/16/2016
PHOMPARB PHOMPARM Browse Performance Appraisals of An Employee 01:10 PM
Actions: (C,D,M,P)

EMPLOYEE :
Act Agency PIN Appraisal Start Appraisal End Appraisal Rating Date Rating Override Reason Aprv Stat
-----
-----

*Agency: _____ *SSN: _____ Due Date: _____ (MMDDYYYY)
Direct Command: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help Main End           Bkwd Fwd           Quit
    
```

Your Action ...	System Response ...
4. The selection criterion includes Agency Number, Social Security Number and Due Date. Enter the selection criteria and press ENTER.	The system will display the requested employee with performance appraisal data. Information is displayed by Agency, PIN, Appraisal Start and End Dates, Appraisal Rating Date, Rating, Override Reason, and Approval Status.
5. Choose the employee for whom a rating is to be given by entering D isplay or M odify under Action.	
6. Press ENTER.	The Record Performance Appraisal screen for the selected employee will appear.

```

PHFNC10 PHV0 STATEWIDE PAYROLL AND HUMAN RESOURCE SYSTEM 05/16/2016
PHOMRA1D PHOMRA1M Record Performance Appraisal 01:02 PM

*Action: = (A,C,D,M,P)

*Agency: _____ *SSN: _____
*PIN: _____ Occu: _____
Approval: _ PAR Sort Code: _____

Appraisal Period Start: _ _ _ Appraisal Period End: _ _ _
Performance Rating: _____ Appraisal Rating Date: _ _ _

*Due Date Override Reason: _

Rater Name: _____

Concur with This Rating: _ PIP: _
Acknowledge Rating: _ PIP Start Date: _ _ _
Transmit for Approval: _

Direct Command: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
Help Main End Note Hist Quit
    
```

Your Action ...	System Response ...
<p>7. Enter the following information if Modify was chosen from the browse.</p> <p>*Agency: The system will display this information.</p> <p>*SSN: The system will display this information.</p> <p>*PIN: The system will display this information.</p> <p>Occu: The system will display this information.</p> <p>Approval: The system will display this information.</p> <p>PAR Sort Code: Performance Appraisal Review sort code - indicates how employee performance reviews are to be sorted. The PAR Sort Code is an alphanumeric 1-4 character code selected by the user to categorize agency positions. The system will display this information if applicable.</p> <p>Appraisal Period Start: The system will display the current appraisal period beginning date. This field cannot be modified.</p> <p>Appraisal Period End: The system will display the current appraisal ending date. This field can be modified.</p>	

Your Action ...	System Response ...
<p>Continue entering the following information:</p> <p>Performance Rating: Enter the performance rating as x.xx. Only numbers 1.00 through 4.00 are valid. NOTE: If modifying a rating on an existing record, the "Notes" screen will pop up requiring an explanation for the change in the rating.</p> <p>Appraisal Rating Date: MM DD YYYY. Must be within 14 days of the appraisal period end date.</p> <p>*Due Date Override Reason: When the Appraisal Rating Date is greater than 14 days from the Appraisal Period End, the Due Date Override Reason field is required. If choosing "Other," a brief narrative must be entered in "Notes."</p> <p>Rater Name: Enter the name of the supervisor performing the rating.</p> <p>Concur with this Rating/Acknowledge Rating: Enter "Y" to indicate concurrence with the performance appraisal rating.</p> <p>PIP: Used only for Performance Improvement Plans. When the rating is below a 2.00, this field is required.</p> <p>Acknowledge Rating: Enter "Y" to indicate acknowledgement of the performance appraisal rating.</p> <p>PIP Start Date: When a PIP entry is made, the beginning date for the plan must be entered in MM DD YYYY format.</p> <p>Transmit for Approval: Enter "Y"es to indicate that the information is complete and the request is ready to be sent for approval; enter "N"o to indicate the record is not ready for approval. If the approval has been approved but not processed, the value will be "F" - approved for a future date. If the record has been approved, it cannot be modified unless the user first withdraws the approval record.</p>	
<p>8. Press ENTER.</p>	<p>The rating will record will have been modified and the system will display the following message:</p> <p>Appraisal ###-aaaa-PIN#-# modified successfully OR Pending record has been Updated - approved by system.</p>

Browse Employees on PIP (Performance Improvement Plan)

This browse option allows the user to review, by entering only the agency number, all employees currently under a Performance Improvement Plan (PIP). When the Appraisal Due Date is entered, the browse screen will display only names of employees on a PIP due as of that date. The third option, after entering the agency number, is to enter the Social Security Number of a particular employee currently under a PIP.

Your Action ...	System Response ...
1. Choose EM (Employment) from the Main Menu and press ENTER.	The Employment Menu will appear.
2. Choose PA (Process Performance Appraisal) from the Employment Menu and press ENTER.	The Process Performance Appraisal Menu will appear.
3. Choose PI (Browse Employees on PIP) from the Process Performance Appraisals Menu and press ENTER.	The Browse Employees on PIP screen will appear.

```

PHFNC10 PHV0 STATEWIDE PAYROLL AND HUMAN RESOURCE SYSTEM 05/16/2016
PHOMPIPB PHOMPIPM Browse Employees on PIP 01:13 PM

Actions: (D,M)

Act Agency PIN Person Name SSN PIP Start Date PIP End Date
-----

*Agency: ____ *SSN: _____ Appraisal Due Date: _____ (MMDDYYYY)
Direct Command: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help Main End Bkwd Fwd Quit
    
```

Your Action ...	System Response ...
4. The selection criteria include Agency, Social Security Number, and Appraisal Due Date. Enter the selection criteria and press ENTER.	The system will display the requested agency's PIP date Information is displayed by Agency, PIN, Person Name, Social Security Number, PIP Start and End Dates.
5. To display or modify the PIP data for a specific employee, select the name of that employee with a Display or Modify action.	
6. Press ENTER.	The Record Performance Appraisal screen for the selected employee will appear.

```

PHFNC10 PHV0 STATEWIDE PAYROLL AND HUMAN RESOURCE SYSTEM 05/16/2016
PHOMRA1D PHOMRA1M Record Performance Appraisal 01:02 PM

*Action: = (A,C,D,M,P)

*Agency: _____ *SSN: _____
*PIN: _____ Occu: _____
Approval: _ PAR Sort Code: _____

Appraisal Period Start: _ _ _ Appraisal Period End: _ _ _
Performance Rating: _____ Appraisal Rating Date: _ _ _

*Due Date Override Reason: _

Rater Name: _____

Concur with This Rating: _ PIP: _
Acknowledge Rating: _ PIP Start Date: _ _ _
Transmit for Approval: _

Direct Command: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
Help Main End Note Hist Quit
    
```

Your Action ...	System Response ...
<p>7. Enter the following information if Modify was chosen from the browse:</p> <p>*Agency: The system will display this information.</p> <p>*SSN: The system will display this information.</p> <p>*PIN: The system will display this information.</p> <p>Occu: The system will display this information.</p> <p>Approval: The system will display this information.</p> <p>PAR Sort Code: Performance Appraisal Review sort code - indicates how employee performance reviews are to be sorted. PAR Sort Code is an alphanumeric 1-4 character code selected by the user to categorize agency positions. The system will display this information if applicable.</p> <p>Appraisal Period Start: The system will display the current appraisal period beginning date. This field cannot be modified.</p> <p>Appraisal Period End: The system will display the current appraisal ending date.</p>	

Your Action ...	System Response ...
<p>Continue entering the following information:</p> <p>Performance Rating: Enter the performance rating as x.xx. Only numbers 1.00 through 4.00 are valid. NOTE: If modifying a rating on an existing record, the "Notes" screen will pop up requiring an explanation for the change in the rating.</p> <p>Appraisal Rating Date: MM DD YYYY. Must be within 14 days of the appraisal period end date.</p> <p>*Due Date Override Reason: When the Appraisal Rating Date is greater than 14 days from the Appraisal Period End, the Due Date Override Reason field is required. If choosing "Other," a brief narrative must be entered in "Notes."</p> <p>Rater Name: Enter the name of the supervisor performing the rating.</p> <p>Concur with this Rating/Acknowledge Rating: Enter "Y" to indicate concurrence with the performance appraisal rating.</p> <p>PIP: Used only for Performance Improvement Plans. When the rating is below a 2.00, this field is required.</p> <p>Acknowledge Rating: Enter "Y" to indicate acknowledgement of the performance appraisal rating.</p> <p>PIP Start Date: When a PIP entry is made, the beginning date for the plan must be entered in MM DD YYYY format.</p> <p>Transmit for Approval: Enter "Y"es to indicate that the information is complete and the request is ready to be sent for approval; enter "N"o to indicate the record is not ready for approval. If the approval has been approved but not processed, the value will be "F" - approved for a future date. If the record has been approved, it cannot be modified unless the user first withdraws the approval record.</p>	
<p>8. Press ENTER.</p>	<p>The rating will record will have been modified and the system will display the following message:</p> <p>Appraisal ###-aaaa-PIN#-# modified successfully OR Pending record has been Updated - approved by system.</p>

Performance Appraisal Report

The Performance Appraisal Report screen is used to generate a report of all appraisals due.

Your Action ...	System Response ...
1. Choose EM (Employment) from the Main Menu and press ENTER.	The Employment Menu will appear.
2. Choose PA (Process Performance Appraisals) from the Employment Menu and press ENTER.	The Process Performance Appraisals Menu will appear.
3. Choose PR (Performance Appraisal Report) from the Process Performance Appraisals Menu and press ENTER.	The Performance Appraisal Report screen will appear.

```

PHFNC10 PHV0 STATEWIDE PAYROLL AND HUMAN RESOURCE SYSTEM 05/16/2016
PHOMAD1P PHOMAD1M Performance Appraisal Report 01:21 PM

*select ALL agencies: N
OR
*Agency numbers: _____
                    _____
                    _____
                    _____
                    _____

Select sort sequence: 1 Agency Number
of the list          _ Appraisal Due Date
                    _ PIN
                    4 PAR sort Code

Select a date range: From date: 07 01 2014
                    To date: 06 30 2016

Direct Command: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
                    Help Main End Quit
    
```

Your Action ...	System Response ...
4. Enter the following information: *Select ALL Agencies: OR *Agency Numbers: Enter "Y" to run the report for all agencies or "N" to specify agencies to be included on the report. The user must have a security level of 3, 4, or 5 to print "ALL" agencies. Select Sort Sequence of the List: The report will always be sorted first by agency and then sorted by the order you select. Select a Date Range (Optional): Enter the From Date or To Date or both.	
5. Press ENTER.	A Batch Job Submission pop up window appears which directs the generation of the report.

Your Action ...	System Response ...
6. Press ENTER.	The system will display the following message: XXXXX XXXXXXXXX Has Been Submitted Successfully.