Talent Management FAQs

Profiles – Employees

1. Who has access to employees' profiles?
   The employee, their current manager, their manager's manager, and specific administrators in HR have access to the profiles.
2. Are employees required to fill out their person profile?
   City related training, licenses, and certifications are required to be entered so that we can better manage expiration dates. Licenses and certifications should include the licensing agency, the date issued, and the expiration date, if applicable. PeopleSoft assists the managers by notifying them of an upcoming expiration.
3. My employee does not want to put personal things on his Person Profile. Is he required to do so?
   Employees are not required to tell us about personal accomplishments, personal licenses or certifications, or volunteer activities if they do not wish to.
4. Once a person profile is created and approved can I remove something from profile? Will it route to my manager again?
   Employees are able to delete items from their profile. The update will not route for approval, even if the item is something that has to be approved when being added.
5. When will I get a notification that my certification or license is due to expire?
   Employees are not notified that a license or certification is close to expiring, but the Manager does get notified. Employees are responsible for tracking their own licenses and certifications and when they expire. Employees can readily access that information at any time by viewing their Person Profile.
6. If I had to provide my credentials or transcripts when I was hired, why do I have to upload it again?
   Your application for employment with the City of Albuquerque might reside in the NEOGOV system or in your paper HR file. There is no way to get these into the PeopleSoft system. Once you upload these documents once, they will reside in PeopleSoft unless you delete them.
7. How will I know if my manager approved licenses, certificates, etc., that I have uploaded to my Person Profile?
   When the manager approves your submission you will receive an e-mail notification.
8. I am an employee. When can I expect an alert for an expiring certification or license? How will I receive this?
   Employees do not receive alerts for expiring Licenses and Certifications. But the Employee's Manager will be alerted. Employees are expected to keep track of their licenses and certifications, and the expiration dates.
9. When is the deadline for creating a Person Profile?

There is no definite deadline, but we'd like Employees to create their Person Profile with work related properties listed as soon as possible. This could include Education, Licenses and Certifications required for your job.

Profiles – Manager

10. What is the purpose of a performance evaluation if we the city does not utilize a pay for performance system?
    The purpose of the performance evaluation is to create a mechanism to identify department goals and improve job performance for the employee and department. It also exists to develop an employee's skill level so if they choose to, they will be better prepared to move up in the organization which in most cases results in an increase in pay.
11. I am a manager and am planning to be out of the office for longer than a couple of days. Can somebody do approvals in my place?
    You can delegate your authority in PeopleSoft to another manager/responsible party. You must note a timeframe for the delegation. You cannot pick and choose which approvals route to your delegate, instead all approvals will route
12. Can I enter a person profile for my employee?
    Managers have the ability to add things to the Employee's profiles, but the intent is for each employee to enter their own.
13. I am a manager. When can I expect an alert for an expiring certification or license? How will I receive this?
    The alerts for expiring licenses and certifications for your Direct Reports will appear on your Manager Dashboard. The first notification will be at 45 days. A message will change to a warning at 15 days. And then the message will become a critical warning at 10 days before the expiration date.

Performance Document – Employees

14. Is the information in profiles and performance documents subject to IPRA?
    Yes, they are subject to IPRA just as the paper evaluations were subject to IPRA. Any information released would be appropriately redacted.
15. Who has access to employees' performance documents?
    The employee, their current manager, their manager's manager, and specific administrators in HR have access to the performance documents.
16. Where can I find the core values?
    The core values are not on line at this time. We are working on a web page that contains the City's Mission, Vision and Core Values and hope to have it completed by year end.
17. Can employees change any of the manager entries or comments?

No. An employee cannot change manager's entries or comments.

18. Can managers change my comments or ratings that I have given myself?
    No. Managers cannot change employee's comments or self-ratings.
19. Can Performance or Career Goals be changed? When is it appropriate to do so?
    Yes, Performance and Career goals can be changed at the Checkpoints and at the Finalize Criteria step, if the goals are no longer applicable.
20. Can I access Talent Management from home?
    Yes, PeopleSoft is available inside and outside of the City's Network.

Performance Document - Manager

21. Are historical performance documents accessible in PeopleSoft?
    As long as the evaluation was completed in PeopleSoft, the employee can access their historical documents. The current manager can also see their employees' historical documents. Historical paper performance evaluations (PEGs/EWPs) can be viewed in City Hall, in HR.
22. There is vacant manager position in my department/division, can performance documents still be created?
    No. performance documents are based off of the employee position-to-manager position relationship in PeopleSoft. In order for employees who report to a vacant manager position to have performance document, their position must be changed to report to an occupied manager position.
23. What do I do if an employee moves to a new position?
    If an employee is moving to a new department or division, the existing manager or HR Coordinator should transfer the performance document to the new manager. The new manager would then edit the performance and career goals or add new goals to the document, as appropriate.
24. What if the employee's ratings and manager's ratings are not in alignment?
    This provides an opportunity for the Manager and the Employee to meet and discuss those differences. Ratings by both the Manager and the Employee should be substantiated with concrete examples and measures of performance. These examples can be captured using both Comments and Performance notes taken throughout the year. The Manager's rating is the official rating.
25. What if I see employees on my manager dashboard that do not report to me?
    Contact your HR Coordinator. All Department HR Coordinators have the ability to correct the Reports-To field in JobData.
26. What if I do not see employees on my manager dashboard that do report to me?
    Contact your HR Coordinator. All Department HR Coordinators have the ability to correct the Reports-To field in JobData.
27. What if my employee does not have an email address?

We are looking for a solution for those folks that do not have a work computer, and therefore a City email account. In the interim, Managers should communicate directly with their employees when there is a step or process that needs to be completed by the employee.

28. What if I hire or lose an employee mid-year/review period?
    For New Hires, managers should use the *Probationary Plus* document for the first year of employment. At the employee's first anniversary, the employee will be moved to the regular review document.
29. Can a hiring manager see an employee's previous performance documents if they are not the current manager?
    No, only the current Manager and their manager can see the employee's performance documents. If a hiring manager would like to request access to a previous performance document they should contact the current manager or the employee.
30. What dates do I use when creating a performance document?
    Use the Last Hire Date or the Date the employee became a regular employee, if they were a temp employee before.
31. Where can I find my employee's anniversary date?
    Your Manager Dashboard will display upcoming employee anniversary dates under the Alerts Banner. You can also click on an employee's name under the Direct Line Reports Banner and it will open up a view with additional information. This additional view will display the Last Start Date which gives you the anniversary hire year in addition to the Month and Day.
32. What if a manager leaves and does not transfer performance documents for her employees? Who can transfer them?
    The department's Talent Management Administrator will have the ability to Cancel, Delete, and Transfer documents.
33. Should a Letter of Instruction be attached to a performance document?
    No, the disciplinary process and the performance management processes are different and should be handled separately. Performance management is NOT a disciplinary process and is not part of the progressive discipline process.
34. How does the new performance management system relate with the progressive discipline process?
    The performance management system and progressive discipline process are two separate processes and serve different purposes. If performance remains unsatisfactory at the end of the evaluation period, an employee can be put on a Performance Improvement Plan (PIP) in an attempt to get their performance to a satisfactory level. If performance fails to improve at the completion of the PIP, it could lead to the disciplinary process.
35. If an employee is out of the office on longer term leave, FMLA, or military leave what do I do with their performance document?
    If their document has been created and you are at a checkpoint, please open the checkpoint, add comments explaining that the employee is on leave, and complete the checkpoint. When the employee returns you may want to discuss if additional comments should be made for that check point. If not continue the process at the next step. If the employee is on leave at the end of the performance period, when the evaluation is supposed to take place, rate your employee

and complete the document. If you anticipate the employee will be returning within a reasonable amount of time, delay routing the document to the final approving manager until the employee has had the opportunity to rate themselves.

36. My employee has an anniversary in May. How do I start the new performance evaluation process for them?
    In the first year of the new process we realize that aligning with anniversary dates might be difficult. You have the option to A- not create a new performance document until the employee's anniversary date or B- create a new performance document from 7/1/2016 through the anniversary date. Please note that the checkpoint dates might not align perfectly for this shortened performance period.
37. I created my Employee's Performance Document with the wrong dates. Can I change the start and end dates?
    No, the dates cannot be changed once the document is generated. You will have to ask your department Talent Management Administrator to Cancel/Delete the document so that you can start over. Any checkpoints or comments that have been added to the document could be lost.
38. I asked my employee to acknowledge that the Performance Review Process was held, but he/she is refusing to do so, what should I do?
    Once you have initiated that request, you will see a button on the top of the Performance Document that says "Override Acknowledgement." Once you click this button, it gives you two options to choose from: Employee Refused or Employee Unavailable.
39. My employee will be completing his 6 month probation in a few weeks. What should I do?
    Complete his current evaluation under the prior method, and then wait for his anniversary date to initiate a new, electronic Performance Document.
40. Can anyone else see my Performance Notes?
    No. Performance Notes are private to the user and are not part of the Performance Document. If you want to add them to the Performance Document you can copy and paste them to the comment sections.
41. If I complete a checkpoint late will the train stop icon change to green upon completion?
    No. If a checkpoint is conducted late the train stop icon will remain red even after you complete the checkpoint.
42. If I forget what the 5 Point Rating Scale definitions are can I view them on the Performance Document?
    Yes. You can view definitions of the rating scale on the document during the final review. There is an icon at every rating point that will display the definitions for you to review.
43. Can a performance goal be changed if expectations change due to new assignments, etc.?
    The answer is two-fold. Yes, the performance goal can be changed if the Finalize Criteria step has not been completed yet. This step occurs when preparing for the final review.

44. What if I need to cancel or delete a Performance Document?
    Managers do not have the ability to cancel and delete documents, but their department SMEs (Administrator) do.
45. What if I need to transfer a Performance Document?

Managers, as well as Department Administrators, can transfers documents to other managers. The navigation to do this is:
For Managers: Main Menu > Manager Self Service > Performance Management > Performance Documents > Administrative Tasks > Transfer Document.
For Administrators: Main Menu > Workforce Development > Performance Management > Performance Documents > Administrative Tasks > Transfer Document.
The job aid for this process can be found at www.cabq.gov/TalentMGT

46. A Performance Document has been transferred to me, as the evaluating manager but the employee does not report to me in PeopleSoft. Where do I go to locate this document?
    Main Menu > Workforce Development > Performance Management > Performance Documents >View Documents
    a. {Manager Self Service … }
47. Where do I find my employee's anniversary date?
    On your Manager Dashboard, find the employee you need and click on the employee's name. It will bring up a page with various items of information about the employee, including their Last Start Date. The Last Start Date is the employee's anniversary date. The only exception to this is if someone goes from Temporary to Permanent. Their anniversary date is the date they became permanent, but it will not show on this page.

Other

48. Can I access PeopleSoft while off-site?
    Yes.
49. Who qualifies as a manager?
    Anyone with a Direct Report(s) in PeopleSoft is identified as a Manager.
50. Will training be provided to employees?
    Yes, all employees will be trained the month prior to their anniversary date. For this initial roll-out, employees with anniversary dates in July, August, or September will be trained August.
51. Where can I access training materials?
    Visit: http://www.cabq.gov/humanresources/workforce-development/talent-management-training
52. Who do I call if I have questions or need assistance?
    Contact HR's PSU Office at (505) 768-3200.