



# COMMONWEALTH of VIRGINIA

SARA REDDING WILSON  
DIRECTOR

*Department of Human Resource Management*

101 N. 14<sup>TH</sup> STREET  
JAMES MONROE BUILDING, 12<sup>TH</sup> FLOOR  
RICHMOND, VIRGINIA 23219  
(804) 225-2131  
(TTY) 711

July 12, 2012

## MEMORANDUM

TO: Agency Human Resource Directors

FROM: E. Steve Hastey, Jr.  
Performance Management Systems Analyst

SUBJECT: Performance Management Evaluation Implementation

The following information is provided for implementation of the calendar year 2012 Performance Management cycle. Please refer to memorandum "Fiscal Year 2013 Authorizations and Compensation Activities," dated July 12, 2012, from Rue White for policy guidance.

1) Begin Evaluation Rating Entry

Agencies may begin entering ratings into the Performance Management database on October 1, 2012 by using the Rating Evaluation Entry/Update PSI000 transaction. To view records, you may scroll through all employees in your agency with the PSI306 transaction, or view an individual employee's record by using the PSI305 transaction. For transaction guidance, please refer to PMIS Manual Volume 1 (Chapter 3-9.1), accessible via the DHRM ITech Web site at <http://web1.dhrm.virginia.gov/itech/>.

Enter ratings only for the October 25, 2011 through October 24, 2012 Performance Management cycle. Old evaluations must not be entered into the 2012 Performance Management (PM) database. Evaluation ratings entered in this Performance Management cycle are required for eligibility for the anticipated December 1, 2012 bonus and will provide the basis for establishing employees' eligibility for future management-initiated pay practices. Therefore, it is essential that all eligible employees be rated.

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Again this year, in order to reduce keying time, agencies may advise their assigned AHRS consultant at DHRM by November 2, 2012 if they want DHRM to enter a "C" rating for all unrated employees other than those hired or re-hired between July 25, 2012 and October 24, 2012. Agencies choosing this option should enter "X," "B," and "L" ratings by November 9, 2012, prior to the mass update. Otherwise, agencies will need to keep track of which employees' ratings will need to be changed from "C" to "X" or "B" following the mass update. Ratings of "L" should be entered prior to the mass update for employees who will not be rated as well as for employees unavailable for rating due to leave. Please note that ratings may be changed at the agency prior to 11/25 by overriding an "X," "B," and "L" rating entry, but once a rating evaluation "X," "C," or "B" code is entered, agencies must notify the DHRM Help Desk to change the rating to "L".

### 2) Performance Increases

No performance increases will be applied during this year's 11/25 PMIS update; however, evaluation rating data is required for eligibility for the anticipated December 1, 2012 bonus, and the rating data will be stored in the DHRM data warehouse. Guidance regarding the PMIS implementation of the employee bonus and its payment on November 30, 2012 will be provided once the availability of funds has been determined.

The statewide (SW) and northern Virginia (FP) pay band salary ranges will not increase this year on November 25, 2012. The salary bands in the classified salary structure, effective November 25, 2007 remain in effect for fiscal year 2013.

All classified employees and salaried non-classified employees, including agency heads and employees assigned role code 90000+ are eligible to be rated except for non-working employees on long-term disability and employees whose Performance Increase (PI) Eligibility date is not set to 11/25/2012.

Faculty will not be included in the Performance Management database; however, if any, ITech will apply faculty base salary increases to PMIS via file input upon request. For more than fifty faculty salary updates having the same effective date, please use the bulk (batch) update method rather than keying faculty salary updates into suspense. Faculty salary updates will not automatically update the Department of Accounts payroll system (CIPPS). If applicable, please deliver your faculty file input by the ratings entry deadline. Faculty file input guidance is available at <http://web1.dhrm.virginia.gov/itech/> under the Documentation tab in the left panel of the Web page, Record File Formats.

### 3) Valid Rating Codes

Valid ratings for entry into the Performance Management database are:

- X: Extraordinary Contributor
- C: Contributor
- B: Below Contributor
- L: *Leave, or otherwise Not Rated*

Agencies with internal procedures that assign more than three rating categories must conform their rating schemes to the rating categories listed above when entering them into the Performance Management database.

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If desired, you may enter an "L" to indicate that the performance evaluation has not been completed or that a rating of "X", "C" or "B" has deliberately not been entered. Ratings may be corrected by overriding the previous entry, but once a rating evaluation ("X", "C" or "B") is entered and the transaction is accepted, you must notify the DHRM Help Desk to change the rating to "L."

The agency/position numbers of the supervisor and reviewer will be captured in the PM database to identify the rated employee's supervisor and reviewer. Please maintain current Supervisor Agency and Position Number fields in PMIS. If available on PMIS, the PMIS Supervisor's Agency and Position Number fields will be utilized to pre-populate supervisor and reviewer evaluation rating entry fields, so this data may be pre-filled on the screen. If the pre-filled numbers are not correct, you may key over the displayed numbers with different agency/position numbers, as required. Where they are not pre-filled, enter the correct agency/position numbers. In any case, **please verify the supervisor and reviewer agency/position numbers before entering the transaction.** (Enter zeros for the agency number, and spaces or any position number, to identify a non-PMIS supervisor and/or reviewer.)

#### 4) Ratings Entry Deadline

Please enter all evaluation ratings into the system by November 9, 2012. Requests for deadline extensions and Performance Management policy questions can be directed to Pamela Watson, Senior Human Resource Consultant, (804) 786-4385 or e-mail to [pam.watson@dhrm.virginia.gov](mailto:pam.watson@dhrm.virginia.gov)

ITech will update PMIS on November 25, 2012, but this year will not produce P-3's during the PMIS update. For rated employees, we also will automatically advance the Performance Increase (PI) Eligibility date from November 25, 2012 to November 25, 2013. PMIS/BES access may not be available on Sunday, November 25, 2012.

#### 5) Suspense Processing

All pending transactions with an effective date of November 25, 2012 will be processed before the PMIS update. For faculty salary updates, if any, please use the bulk update method rather than keying faculty salary updates into suspense (see above for guidance).

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6) Initial Reports

Performance evaluation reports will be stored in the Human Resource Management (HuRMan) file repository accessible via the DHRM ITech Web site at <http://web1.dhrm.virginia.gov/itech/>, "File Repository" tab in the left panel of the Web page. Registration is required to gain access to the File Repository and is also accomplished via the DHRM ITech Web site, "Request Access" tab in the left panel of the Web page. Agencies entering evaluation ratings for other agencies may need to request additional access. Below are descriptions of the initial reports. Please see the attached Agency Quick Reference card for descriptions of all the Performance Management Evaluation reports.

- "Load Listing" - PM9495. Provides a listing of employees with a Performance Increase (PI) Eligibility date of 11/25/2012. Only employees with this date will be loaded to the Performance Management database. Ratings can be entered only for employees listed on the latest copy of this report. This report will be available October 1, 2012, and will be reproduced in each PM database reload utilizing current PMIS employee status. Agencies can also download employee data into Excel for review using our e480 Workforce query tool: <http://web1.dhrm.virginia.gov/itech/>, "Workforce Planning" tab in the left panel of the Web page. To request access, select the "Request Access" tab in the left panel of the Web page.
- "Performance Increase (PI) Eligibility Dates Not 11/25/2012" - PM9970 report. This report will be available beginning October 1, 2012 in HuRMan. A rating cannot be entered until an employee's PI Eligibility date is 11/25/2012. If you receive a copy of this report, the listed employees' records should be researched as to the reason for their PI Eligibility dates and, if appropriate, brought up-to-date by submitting a P-3 to DHRM's Office of Agency Human Resource Services. The Performance Management database will not reflect the updated eligibility date until we perform a reload of the PM database, as scheduled below.

7) Projected PM Database Reload Reports Availability Dates

October 1, 2012	(PMIS status effective 09/30)
October 16	(PMIS status effective 10/15)
November 1	(PMIS status effective 10/31)
November 15	(PMIS status effective 11/14)
November 23	(PMIS status effective 11/22)
November 26	(PMIS status effective 11/25)

An Agency Quick Reference card outlining important performance evaluation dates, all of the PM reports descriptions, and the list of PM transactions is attached for your convenience. You are encouraged to print the card on colored cover stock paper for easy reference.

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8) Active Military Supplement Increase

ITech will not increase Active Military Supplements this year as there will not be a performance increase to apply on November 25, 2012. (The Temporary Pay field contains the semi-monthly Active Military Supplement when the employee's leave-code is equal to "05", LWOP-Military.)

Please direct P-3 requests, questions or problems regarding the Performance Management Evaluation technical implementation to the DHRM Help Desk via <http://web1.dhrm.virginia.gov/itech/> (Help Desk tab in the left panel of the Web page).

Attachment

cc: Sara Redding Wilson, Director, DHRM  
Rue White, Director, Agency Human Resource Services, DHRM  
Belchior Mira, Director, Office of Information Technology, DHRM