

# PROCESSING PERFORMANCE RATINGS AGENCY QUICK REFERENCE

## 2016 CYCLE SCHEDULE/TRANSACTION SUMMARY/REPORTS

<u>SCHEDULE FOR 2016 CYCLE</u>		<u>TRANSACTION SUMMARY</u>
<u>DATE</u>	<u>ACTIVITY</u>	Enter transaction IPPIPP to display a summary of Performance Management (PM) Evaluation transactions. See <a href="http://web1.dhrm.virginia.gov/itech/guidesandmanuals.html">http://web1.dhrm.virginia.gov/itech/guidesandmanuals.html</a> to access the Performance Management Keying Guide in the Knowledge Center for assistance.
October 1, 2016	"Load Listing" of rating-eligible employees and listing of employees with "Performance Increase Eligibility Dates Not 11/25/2016" produced. <u>Initial date to begin entering ratings.</u>	<p style="text-align: center;"><b>PERFORMANCE MANAGEMENT MENU</b></p> <ul style="list-style-type: none"> <li>▶ <b>PSI000,000000000</b>      <b>PM Evaluation Entry/Update ( Employee-id or SSN Required)</b></li> <li>▶ <b>PSI305,000000000</b>      <b>PM Employee Display ( Employee-id or SSN Required)</b></li> <li>▶ <b>PSI306</b>                      <b>PM Agency/Employee Scroll (Allows Selection by Rating Code)</b></li> <li>▶ <b>PSI306,000</b>                <b>PM Agency/Employee Scroll (Agency Number Required)</b></li> <li>▶ <b>PSI306,000,xxxxx</b>      <b>PM Agency/Sub-Unit/Empl Scroll (Agency/Sub-Unit Required)</b></li> <li>▶ <b>PSI999,000</b>                <b>PM Agency Totals Display (Agency Number Required)</b></li> <li>▶ <b>PSI999,000,xxxxx</b>      <b>PM Agency/Sub-Unit Totals Display (Agency/Sub-Unit Required)</b></li> </ul>
Periodic Oct. 15 – Nov. 25, 2016	Performance Management database is reloaded to capture employee status updates. Ratings are reloaded and reload reports are produced.	
<b>November 18, 2016</b> ➡	<b><u>Final Date for Entering Ratings</u></b> November 18 <sup>th</sup> is the final date for agencies to key ratings. Requests for extensions or for DHRM to key any remaining rating entries retroactively following the 11/25 update can be directed to Pamela Watson, Senior Human Resource Consultant, (804) 786-4385 or e-mail to <a href="mailto:pam.watson@dhrm.virginia.gov">pam.watson@dhrm.virginia.gov</a> .	
November 25, 2016	PMIS will be updated with the evaluation ratings, and the Performance Increase (PI) Eligibility dates will be advanced for rated employees.	
After November 25, 2016	Late entry of evaluation ratings or changes to evaluation ratings must be submitted through the DHRM ITech Help Desk via <a href="http://web1.dhrm.virginia.gov/itech/">http://web1.dhrm.virginia.gov/itech/</a> .	

## PROCESSING PERFORMANCE RATINGS

### 2016 Performance Management Reports

REPORT	TITLE/CONTENTS/GENERAL DESCRIPTION	SUGGESTED USAGE/OTHER COMMENTS
PM9495	<p style="text-align: center;"><u>PM LOAD LISTING</u></p> <p>Provides a listing of employees with a Performance Increase (PI) Eligibility date of 11/25/2016. Only employees with this date will be loaded to the Performance Management (PM) database. Ratings can be entered only for employees listed on this report.</p>	<p>Agencies should use this report in conjunction with report PM9970 , "PI Eligibility Dates Not 11/25/2016" to verify that the PI Eligibility date is correct for all employees who should receive a rating for this cycle. Please review the "Pay Schedule" field displayed on Report PM9495. This value indicates the number of times the employee is paid per year.</p>
PM9970	<p style="text-align: center;"><u>PI ELIGIBILITY DATES NOT 11/25/2016</u></p> <p>A rating cannot be entered until an employee's PI Eligibility date is 11/25/2016. If you have received a copy of this report, these records should be investigated as to the reason for the PI Eligibility date, and if appropriate, brought up-to-date by submitting a P3 to this office for corrective action. The PM database will not reflect the updated eligibility date until a reload of the PM database is performed.</p>	<p>Agencies should use this report to validate the PI Eligibility dates of the employees listed. PI Eligibility dates earlier than 11/25/2016 are probably errors and should be sent to DHRM for correction.</p>
PM9535	<p style="text-align: center;"><u>RELOAD EVALUATION RATINGS</u></p> <p>The PM database is reloaded periodically to capture current employee status. This report provides an employee listing of those with previously entered ratings that were retained during the reload. An exception report, "Reload Ratings Exception List," is also provided if ratings were not retained. For example, employees who have separated from state service are deleted from the PM database during the reload process and reinstated employees are added.</p>	<p>Agencies may use this report to confirm that evaluation data previously entered has been retained. (The rating code itself may be suppressed on this report.) The record change indicator 'Y' means the employee changed agency. The record change indicator 'L' means the employee has not been rated and still has the 'L' rating code. A blank record change indicator means there was no significant change to report since the last reload.</p>
PM5115	<p style="text-align: center;"><u>SALARY ADJUSTMENT ELIGIBILITY LISTING</u></p> <p>Though no increases are approved, PM5115 will list employees rated Contributor or higher. This report will also sum the current salaries by sub-unit and agency. PM5115 is scheduled to begin with the November 16<sup>th</sup> Performance Management database reload.</p>	<p>Agencies should use this report to confirm that the correct employee information has been captured and that the current salaries are correct for their employees.</p>
PM5125	<p style="text-align: center;"><u>SALARY ADJUSTMENT EXCEPTION LISTING</u></p> <p>Though no increases are approved, PM5125 will list employees whose records cannot be updated or whose records require maintenance for the specified reasons. Also lists employees rated Below Contributor. The PM5125 report is scheduled to begin with the November 16<sup>th</sup> Performance Management database reload.</p>	<p>Agencies should review the reasons noted and initiate appropriate corrective actions.</p>