AGENCY ONBOARDING PROCESS

This checklist outlines the steps to prepare your agency for ePerformance:

Step 1: _____
- Verify that job profiles for agency jobs are correct and up-to-date in PeopleSoft.

Step 2: _____
- Run Query 0HR045 to verify that Reports To information is up-to-date.
- Confirm all "reports to" fields have been populated and are accurate for your agency.
- Begin correcting and maintaining the "reports to" field throughout the year.

Step 3: _____
- Run Query 0HR046 to verify email addresses have been populated with the correct email address in PeopleSoft.
- Send employees to the following navigation to update their e-mail address: Employee Self Service > Personal Information > Email Address.
- Work with your IT department to ensure that e-mail notifications will flow between managers and employees without firewall issues (See DOAS~HRA Performance Management webpage for Firewall Instructions).
- Check your Internet Browser to ensure compatibility. The version of PeopleSoft the State currently uses is compatible with Internet Explorer version 10. If you are using 7, 8, or IE9, see the compatibility instructions on the DOAS~HRA Performance Management webpage.

Step 4: _____
- Determine the names and submit along with the employee IDs for the HR Administrators to be trained to ePerformance@doas.ga.gov.
- In addition, determine the departments the HR administrator(s) will oversee and email to ePerformance@doas.ga.gov.
- Complete the online SAO HCM Security Application form for all HR Administrators within PeopleSoft under Agency Security; confirm options 12 & 13 for ePerformance HR Admin access and submit for approval (See HCM Security Application HR Admin job aid on the DOAS~HRA Performance Management webpage).
- Contact the DOAS HRA Performance Management Team to discuss HR Administrators training. It is recommended that at least two HR Administrator's from each agency be trained.

Step 5: _____
- Ensure that all managers and employees have PeopleSoft logins. If passwords need to be reset, contact the SAO Security Helpdesk at sao_ps_access@sao.ga.gov.

Step 6: _____
- Meet with DOAS HRA Performance Management Team to discuss ePerformance options:
  - Frequency of reviews – quarterly, mid-year, annual
  - Which sections of form to use
  - Weightings of individual sections
  - Any additional required competencies, goals or job responsibilities for agency
  - Individual development plan – required or optional

       o Employee self-evaluation – required or optional

       o Timeline for implementation and process steps

       o Communication methodology

       o Training (HR Admin, Manager, Employee)

Step 7: _____ • Complete HR Admin Training with DOAS HRA Performance Management Team.

Step 8: _____ • Train managers and employees using materials on the DOAS HRA Performance Management website and the online training provide by SAO in the TeamWorks HCM Online Training section.

Step 9: _____ • Create Documents (See the HR Admin Guide on the DOAS~HRA Performance Management webpage).
      • Run the View Document Creation Results and Missing Documents reports (See the HR Admin Guide).
      • Troubleshoot by correcting any document creation errors (i.e., "reports to")