

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 only compatible with Internet Explorer versions 7 & 8. If you are using 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
 - Employee self-evaluation – required or optional
 - Timeline for implementation and process steps
 - Communication methodology
 - 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”)