

# PROCESSING PERFORMANCE RATINGS AGENCY QUICK REFERENCE

## 2004 CYCLE SCHEDULE/TRANSACTION SUMMARY/REPORTS

<u>SCHEDULE FOR 2004 CYCLE</u>		<u>TRANSACTION SUMMARY</u>
<u>DATE</u>	<u>ACTIVITY</u>	Enter transaction PMEVAL to display a summary of Performance Management Evaluation transactions.
September 16, 2004	"Load Listing" of rating-eligible employees and listing of employees with "Performance Increase Eligibility Dates Not 11/25/2004" produced. <u>Initial date to begin entering ratings.</u>	<b>PERFORMANCE MANAGEMENT MENU</b>  ▶ <b>PSI000,000000000</b> <b>PM Evaluation Entry/Update (SSN or Employee-id Required)</b>  ▶ <b>PSI104</b> <b>PM Enter Agency MEL Or Agency Sub-Unit MEL [Optional]</b>  ▶ <b>PSI305,000000000</b> <b>PM Employee Display (SSN or Employee-id Required)</b>  ▶ <b>PSI306</b> <b>PM Agency/Employee Scroll (Allows For Rating Option)</b>  ▶ <b>PSI306,000</b> <b>PM Agency/Employee Scroll (Agency Number Required)</b>  ▶ <b>PSI306,000,xxxxx</b> <b>PM Agency/Sub-Unit/Empl Scroll (Agency/Sub-Unit Required)</b>  ▶ <b>PSI999,000</b> <b>PM Agency Totals Display (Agency Number Required)</b>  ▶ <b>PSI999,000,xxxxx</b> <b>PM Agency/Sub-Unit Totals Display (Agency/Sub-Unit Required)</b>
Periodic Oct. 1 – Nov. 25, 2004	Performance Management database is reloaded to capture employee status updates. Ratings are reloaded and reload reports are produced.	
<b>November 19, 2004 *</b>	<b><u>Final Date for Entering Ratings</u></b> November 19 <sup>th</sup> is the final date to enter ratings without a deadline extension granted by DHRM, AHRS. Requests for deadline extensions can be directed to Robert Weaver, Senior Compensation Consultant, (804) 225-2251 or e-mail to <a href="mailto:bob.weaver@dhrm.virginia.gov">bob.weaver@dhrm.virginia.gov</a> .	
November 25, 2004	PMIS will be updated with the salary increases and rating evaluations, and the Performance Increase (PI) Eligibility dates will be advanced for rated employees.	
After November 25, 2004	Late entry of rating evaluations or change to rating evaluations must be submitted through the DHRM ITech Help Desk via <a href="http://web1.dhrm.state.va.us/itech/">http://web1.dhrm.state.va.us/itech/</a> .	

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## 2004 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 11/25/2004. 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 11/25/2004" to verify that the PI Eligibility date is correct for all employees who should receive a rating for this cycle.</p>
PM9970	<p style="text-align: center;"><u>PI ELIGIBILITY DATES NOT 11/25/2004</u></p> <p>A rating cannot be entered until an employee's PI Eligibility date is 11/25/2004. 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 11/25/2004 are probably errors and should be corrected.</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 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 has been 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 (no increase will be applied if rated 'L'). 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>Lists all qualified employees whose records are eligible to receive a base salary increase automatically. This report also sums the current salaries and the projected increase by sub-unit and agency. This report is scheduled to begin with the November 15th PM database reload (only current salaries until the increases are calculated).</p>	<p>Agencies should use this report to confirm that the correct employee information has been captured and that the current and projected salaries are correct for their employees. For example, the "Period Pay" computation utilizes the PAY-SCHEDULE field, i.e. number of times paid per year. <b>If the PAY-SCHEDULE value is incorrect, an erroneous "Period Pay" salary will result.</b></p>
PM5125	<p style="text-align: center;"><u>SALARY ADJUSTMENT EXCEPTION LISTING</u></p> <p>Lists employees whose records cannot be updated or whose records require maintenance for the specified reasons. Also lists employees whose salaries are at or above the new Pay Band maximum, and lists employees rated Below Contributor. This report is scheduled to begin with the November 15th Performance Management database reload.</p>	<p>Agencies should review the reasons noted and initiate appropriate corrective actions. This report also lists the lump sum performance amounts paid in lieu of base salary increases for employees whose salaries are at or above the new Pay Band maximum.</p>