

Procedures for Entering Performance Plans/Performance Requirements, Individual Development Plans/Training & Development Memos, Mid-year Progress Reviews, Close-Out Reviews, and Performance Appraisals into EmpowHR

NOTE: All senior level executive performance appraisal ratings are entered into EmpowHR and uploaded to Confluence by Human Resources Services after the annual approval process is completed. All other WPM documents are to be entered and uploaded by the service unit.

1. Sign in and Select Employee

Sign into EmpowHR and go to the Manage Performance menu. Click the LC Employee Appraisal link.

The following Search page will appear:

Menu

Search:

- ▷ My Favorites
- ▷ Employee Self Service
- ▷ Manager Self Service
- ▷ PAR Processing
- ▷ Position Management
- ▷ Payroll Documents
- ▷ HR Reports
- ▷ Recruiting
- ▷ Payroll Processing
- ▷ Training Administration
- ▷ Workforce Administration
- ▼ Manage Performance
 - ▷ Use
 - ▷ Inquire
 - ▷ Setup
 - ▷ Report
 - LC Employee Appraisal**
- ▷ Non-Employee Processing

LC Employee Appraisal
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

EmplID: begins with

Empl Rcd Nbr: =

Social Security Number: begins with

Name: begins with

Last Name: begins with

Include History Correct History Case Sensitive

[Basic Search](#)

- Enter the employees Last Name or Emplid.
- To view all performance documents entered for the employee, click the Include History box. To correct data previously entered or to insert prior dated rows, click the Correct History box.
- Click Search and select the employee from the Search Results list.

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2. Adding Performance Plan and IDP

NOTES:

a. If multiple documents to be added have the same signature date, they **must** be entered into EmpowHR with different Review Signature Dates. For example:

IDP signed 3/30/2017

Performance Plan signed 3/30/2017

Official Rating signed 3/30/2017

If the three documents above need to have Review Signature Dates before 4/1/2017, the first document to be entered must have a Review Signature Date of at least 3/28/2017, the second document can have a Review Signature Date of 3/29/2017 and the last document can have the Review Signature date of 3/30/2017.

b. If a document to be entered has an earlier Review Signature Date than the last document in EmpowHR, it must be inserted in sequential Review Signature Date order. For example:

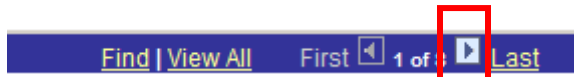
User needs to enter a performance plan with a Review Signature Date of 9/12/2016. The employee has three actions in EmpowHR,

Initial Review 03/01/2016

Official Review 09/01/2016


IDP 09/15/2016

The user must click the right arrow in the Review Details header to scroll to the IDP dated 9/15/2016. Use the '+' icon to insert the performance plan.



- To enter a new performance document you must click the '+' icon to insert a new row of data.
- Enter the **Review Signature Date** of the performance document. This is usually the date the employee and supervisor meet, review, and sign the Performance Plan/ Performance Requirements (2910) or IDP or Training & Development Memo (2910.) **NOTE: This date must be different from any date already saved on the page.**
- Enter the **Review Type**. Individual Development Plan/Training & Development Memo (IDP) or Performance Plan/Performance Requirements (Perf Plan) are the correct values.

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- Enter the **From and To** dates of the appraisal period covered. **Note:** IDP/Training & Development Memo and Performance Plan/Performance Requirements dates most likely will be future dates because these documents are completed at the beginning of the appraisal period.
- The **Next Review Date** is system calculated to display the date that is 365 days after the period To Date. **For IDP/Training & Development Memo and Performance Plan/Performance Requirements, delete the next review date.**
- Enter the **Rating Scale**. Click the look up icon  to get a list of valid values.

Look Up Rating Scale

Rating Model:

Description:

[Basic Lookup](#)

Search Results

View All First 1-6 of 6 Last

Rating Model	Description
2477	AFSCME 2477 Performance Eval
2910	AFSCME 2910 Performance Eval
CRSL	CREA Senior Level Perf Eval
MGMT	GS-15&below Mgrs&Supvsrs Eval
NSUP	GS-15&below Non-Supvsrs Eval
SL	Non-CREA Senior Lev Perf Eval

2477 = employees covered by the 2477 bargaining unit

2910 = employees covered by the 2910 bargaining unit

CRSL = CREA senior level employees


MGMT = Managers GS-15 & below and all supervisors

NSUP = GS-15 & below non-bargaining and non-supervisory employees and non-senior level CREA employees

SL = non-CREA senior level employees

- Enter **Review Rating**. For IDP/Training & Development Memo and Performance Plan/Performance Requirements, enter 'N' for Not Applicable.
- Enter the **Review Level**. Indicates the type of review being entered. This field defaults to Approved/Official.

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- Enter the **Reviewer ID**. Click the look up icon  to type the reviewer's name in the search field.
- Enter any **Comments**. The text of the IDP/Training & Development Memo and Performance Plan/Performance Requirements does not have to be cut and pasted here. Enter a note that the "Documents have been discussed and signed and uploaded to the Confluence PMR." ("PMR" is the Performance Management Repository for all WPM documents.)."
- **Save** the record by pressing the save button at the bottom left of the page. The warning message below might appear. Click OK to the message(s), and the data will be saved.

Warning -- Review Date 2011-03-30 should be later than Review Period End Date 2011-03-31. (1020,20)

Review Dates should be later than the period they cover. Correct whichever date is appropriate.

OK

Cancel

- **Upload scanned copies** of Performance Plan/Performance Requirements and IDP/Training & Development Memo to the [PMR](#).
- To enter a document for another employee, click the **Return to Search** button. This will take you to the main search page to enter another employee's ID number or name.

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3. Performance Appraisal, Mid-year Progress Review, Initial Review and Close-Out Review

- If an appraisal/review has not been entered for the employee, a page with today's date will be displayed in the Review Signature Date field. The other fields will be blank. Enter the correct Review Signature Date and complete all other fields.
- If the employee has a previous appraisal/review recorded, you will see the latest information. **To enter a new appraisal/review, you must click the '+' icon to insert a new row.**

Employee Appraisal 1 | **Employee Appraisal 2**

Employee ID: 077557 Empl Rcd #: 0

Review Details Find | View All First 1 of 1 Last

*Review Signature Date: 07/07/2010 *Review Type: Offcl Rtnng +

From/To Date: Next Review Date: Scheduled?

*Rating Scale: *Review Rating:

Agency: AE LC Library of Congress

Department: 920896 OFC OF STRATEGIC PLAN/AUTO Position: 90146697

Job Code: 137215 INFORMATION TECHNOLOGY SPECIAL Supervisor: 8 Other

Pay Plan-Occ-Grade: GS 2210 13

Calendar Year Fiscal Year Anniversary Date

Reviewers Find First 1 of 1 Last

*Review Level: Approved/Official + -

Reviewer ID:

Comment:

[Employee Appraisal 1](#) | [Employee Appraisal 2](#)

- Enter the **Review Signature Date** of the appraisal/review. This is usually the date the employee and supervisor meet, review, and sign the Performance Appraisal, Mid-year Progress Review, or Close-Out Review.
- Enter the **Review Type**. Close-Out Review (Close Rvw), Interim rating for the employee's Mid year Review (Intrl Rtnng) and the yearly Official Rating (Offcl Rtnng) are the valid values.
- Enter the **From and To** dates of the entire appraisal/review period.

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- The **Next Review Date** is system calculated to display the date that is 365 days after the period To Date.

NOTE: Delete this date for all close-out review, interim rating, and initial rating entries.

- Enter the **Rating Scale**. Click the look up icon  to get a list of valid values.

Look Up Rating Scale

Rating Model: begins with

Description: begins with

Look Up

Clear

Cancel

[Basic Lookup](#)

Search Results

View All

First 1-8 of 6 Last

Rating Model	Description
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CRSL	CREA Senior Level Perf Eval
MGMT	GS-15&below Mgrs&Supvsrs Eval
NSUP	GS-15&below Non-Supvsrs Eval
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CRSL = CREA senior level employees


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NSUP = GS-15 & below non-bargaining and non-supervisory employees and non-senior level CREA employees

SL = non-CREA senior level employees

- Enter **Review Rating**. Click the look up icon  to get a list of valid values.
- **Cycle Indicator:** Click the **Calendar** button if the employee is being rated for work performed during the calendar year (January 1 – December 31). Click the **Fiscal** button if the employee is being rated for work performed during the fiscal year (October 1 – September 30). Click the **Anniversary** button if the employee is being rated on the grade entry date.

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- Enter the **Reviewer ID**. Click the look up icon  to type the reviewer's name in the search field.
- Enter any **Comments**. The text of the Performance Appraisal, Mid-year Progress Review, or Close-Out Review does not have to be cut and pasted here. Enter a note that the "Documents have been discussed and signed and uploaded to the PMR."
- **Save** the record by pressing the save button at the bottom left of the page.
- To enter an appraisal for another employee, click the Return to Search button. This will take you to the main search page to enter another employees' ID number or name.
- **Upload scanned copies** of appraisal/review to the PMR.