

PeopleSoft ePerformance 9.0 Implementation at a large Bank

Business Challenge:

The Bank has a manual performance appraisal system, which involves a gamut of processes including ensuring timely self evaluation by employees, co-ordination of participants for evaluation, co-ordination and moderation of appraisal ratings and finally huge documentation to support each one of these steps. All these tasks need to be carried out in a limited timeframe, delay in which will impact the appraisal / promotion of deserving employees.

In a nutshell, The Bank was looking for a solution that can implement an appraisal system that

- ✚ Is accessible and available to all grades of employees within the bank
- ✚ Caters to multiple levels of review and moderation based on the rating of the employee
- ✚ Makes the feedback and rating of all participating parties to the current reviewer

Solution:

The PeopleSoft ePerformance module provides functionality that enables organizations to create a versatile number of appraisal templates. Performance distribution and maintenance is automated and hence time saving. Since The Bank uses the PeopleSoft HCM suite, configuring ePerformance would be the most cost-effective solution.

✚ Configuration and Setup:

Configuration of the Content Catalog, the ePerformance Document structure and template definitions to cater to the different employee scales.

✚ Appraisal Document Distribution:

The appraisal document would be distributed centrally using the PeopleSoft Group Build feature. This will replace the manual process of distributing the appraisal forms to all employees and reduce overheads like printing, mailing, distribution etc. Groups will be created based on the employee scale and the performance documents will be distributed for the review period. Appraisers would then be able to access the documents through Manager Self Service and the Appraisee would be able to access the document for self evaluation through Self Service.

✚ Employee Self Evaluation:

The employee can access his performance document through Self Service. The employee would need to fill in his Bio Data profile, Business Dimensions (If he is in Operations) and also his self performance appraisal. The Bio data profile and Business Dimensions forms are not delivered by PeopleSoft – these are customized pages. However, these have been integrated into the delivered Self Service document so that the employee can enter all these documents from a single place.

Manager Evaluation:

The Appraiser evaluation is done through Manager Self Service. Here the appraiser is able to view all his direct reports and can provide feedback for them individually. Here the manager would be able to view the entire self appraisal done by the employee (Bio Data, business dimension as well as Self evaluation) and also provide his feedback and rating based on them.

Depending on the scale and rating of the employee, the performance document would be transferred to multiple levels of review.(Reviewing Authority, Moderator and Review Committee)

Once all the levels of review are completed, the performance appraisal process is marked complete, after which the performances are viewable only as history.

Security:

The ePerformance Administrator would be able to view Circle Office wise data(both historical and current), hence giving the users from the HRM Section access to only those employees who are part of their Circle Office.

The employees and managers would be able to access the performance system only during the appraisal cycle.

Benefits:

The implementation of the ePerformance provides a 360 degree view of the employee appraisal and also saves time and provides critical and accurate performance evaluation information.