

AZPerforms!

Agency Admin Role

Victor Carrasco, HRIS Sr Mgr
Tu Nguyen, HRIS Architect

Agenda

- ❑ Overview of Agency Admin Role
- ❑ How to request the Agency Admin Role
- ❑ Logging in to AZPerforms!
- ❑ Agency Admin Dashboard
- ❑ Re-assigning an appraisal
- ❑ Initiate/Assign appraisal - Vacant Manager positions (Next Non-Vacant)
- ❑ Initiate/Assign appraisal - Vacant Manager positions (Any Appraiser)
- ❑ Initiate/Assign appraisal - Non-Vacant Manager positions
- ❑ Acknowledgement for EE refusal to sign

What Does the Agency Admin Role Entail?

This higher level access allows the agency admin to support the organization in administrative tasks for the AZPerforms! process

Agency admins will be able to take the following actions on an **ACTIVE** Formal Appraisal (FA):

- ❑ Reassign to another State employee within the assigned agency and process Levels
- ❑ Reassign to themselves (their own power user account only, not their personal EIN) to take action
- ❑ Initiate and re-assign appraisals for direct reports of a vacant manager position. At this time this feature is only agency wide

NOTE: When a Formal Appraisal is reassigned to the agency admin's power user account, the Agency Admin will have access to edit the document, including comments and ratings, and take any other actions available to the document owner

Requesting the Agency Admin Role

We have streamlined the request process to mimic the same process we use to request any HRIS or PageUp access.

Steps to Request Agency Admin:

1. [Access the power user form](#)
2. Select PMAZPAdmin (Pilot Only)
3. Get signature from your leader
4. Submit form to your agency security approver

Some items to note:

- ❑ The role can be restricted by agency and process level for re-assigning purposes
- ❑ The role is only agency wide for creating and re-assigning function when there is a vacant manager
- ❑ It can take up to 24 hours for the security team to complete the provisioning request

ARIZONA HRIS, MAP, Recruitment Portal, Process Maker, Data Warehouse			
Power User Access Request Form			
<small>Effective July 20, 2020 HRIS and Data Warehouse Power User access requires VPN or other Remote Access software to access the systems from a remote location.</small>			
GENERAL INFORMATION			
DATE: _____	ACTION: _____	SELECT_	
Effective Date (if applicable): _____	AGENCY: _____	SELECT_	
EMPLOYEE	SECURITY ROLE/S REQUESTED		TRAINING COMPLETION DATE
Employee ID (EIN): _____	Security Role 1 (Required)	PMAZPAdmin (Pilot Only)	<small>Click for training requirements</small>
Last Name: _____	Security Role 2 (Optional)	SELECT_	_____
First Name: _____	Security Role 3 (Optional)	SELECT_	_____
Middle Initial: _____	Security Role 4 (Optional)	SELECT_	_____
State E-mail Address: _____	Security Role 5 (Optional)	SELECT_	_____
State Phone Number: _____	Security Role 6 (Optional)	SELECT_	_____

Logging into AZPerforms!

Link from HR SYSTEMS page

<https://hrsystems.azdoa.gov/>

The screenshot shows the homepage of hrsystems.azdoa.gov. At the top, there is a navigation bar with the Arizona Department of Administration logo and links for Employee News & Updates, Check System Availability, and a phone number (602-542-4700). Below the navigation bar, there are four main portal cards:

- HRIS Portal:** For HRIS power users utilizing HRIS to perform tasks related to hiring, benefits, leave administration, terminations, and payroll. Includes a Login button and a Resources link.
- Performance Management Portal:** For MAP Proxy users logging in with their EIN to perform tasks related to agency MAP issues. Includes a Login button and a Resources link.
- Recruitment Portal:** For Recruitment professionals responsible for the end-to-end recruitment processes for their agency/organization. Includes a Login button and a Resources link.
- AZ Performs! Portal (Pilot):** For Agency Admins logging in with their Power User ID to perform tasks related to agency AZPerforms! issues. This card has a red box around its Login button and a Resources link.

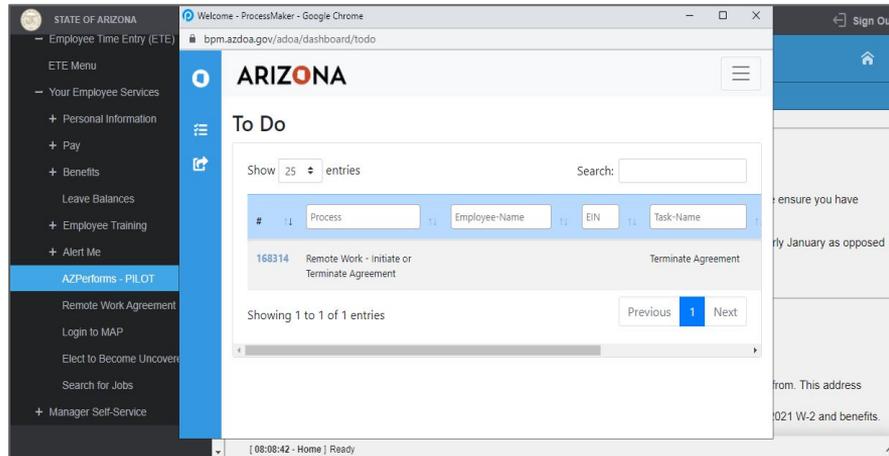
1. <https://bpm.azdoa.gov/saml2/login>
2. Enter **Power User ID** and password
3. Click Sign in

The screenshot shows the login page for the AZPerforms! Portal. The page has a header with the Arizona Department of Administration logo and a warning message: "Internet Explorer (IE) is not compatible with this website. If you are using IE please update to Chrome, Safari, Firefox, or Edge." Below the warning, there is a section for "Portal login for State of Arizona HR Systems: Y.E.S., HRIS, Recruitment Portal, and MAP." The login form includes a "Sign in with your user account" label, a Username field, a Password field with a "show password" link, and a "Sign in" button. At the bottom, there are links for "New Employee? Forgot / Reset Password" and "Issues logging in? click here".

Logging into AZPerforms!

If you try to sign in through YES or have a YES session open on different tab/window, it will sign you in under your employee profile, not your admin account. Ensure you are logged out from YES and using the link in step number 1.

If you are logged into HRIS or have an HRIS session open, it will sign you in under your Power User profile.



The screenshot shows a web browser window displaying the AZPerforms - PILOT dashboard. The browser's address bar shows the URL `bpm.azdoa.gov/adoa/dashboard/todo`. The dashboard features a dark blue sidebar on the left with a menu including "Employee Time Entry (ETE)", "Your Employee Services", and "AZPerforms - PILOT" (which is highlighted). The main content area is titled "ARIZONA To Do" and contains a table with one entry. The table has columns for "#", "Process", "Employee-Name", "EIN", and "Task-Name". The entry has the ID "168314" and the task name "Remote Work - Initiate or Terminate Agreement". Below the table, it indicates "Showing 1 to 1 of 1 entries" and includes "Previous", "1", and "Next" navigation buttons. The system tray at the bottom shows the time as 08:08:42 and the status as "Home | Ready".

#	Process	Employee-Name	EIN	Task-Name
168314	Remote Work - Initiate or Terminate Agreement			Terminate Agreement

Agency Admin User Dashboard

The dashboard provides stats for the requests you have open. You can also filter by task status.

[To Do](#) [Requests](#) [Tasks](#) + START HERE CN

[/ Requests / My Requests](#)

 **13**
My Requests

 **13**
In Progress

 **11**
Completed

Process In Progress CAMBREAL NIELSEN Participants ... Q +

#	Name	Status	Participants	Started	Completed
#10051	AZPerforms - Formal Employee Appraisal	In Progress	CN	02/04/2022 08:40	▶
#10047	AZPerforms - Formal Employee Appraisal	In Progress	CN	02/03/2022 16:00	▶
#10022	AZPerforms - Formal Employee Appraisal	In Progress	CN AR RD	02/03/2022 12:30	▶

Agency Admin Dashboard

In addition to User Dashboard, Agency admin account has an Agency Dashboard. This allows Agency Admin to see all agency requests. These requests can be filtered by process level, request date range, agency, and status. The result can be refined or searched.

The screenshot displays the Agency Admin Dashboard interface. On the left is a blue vertical sidebar with various icons, including a home icon highlighted with a red box. The main content area has a top navigation bar with 'To Do', 'Requests', and 'Tasks' tabs, along with a '+ START HERE' button and a user profile icon 'TN'. Below this is a 'Criteria of Search' section with filters for 'From (Request Started)', 'To (Request Started)', 'Agency', 'Process Level', and 'Status'. The 'Agency' filter is set to 'AD'. A 'GET LIST' button is located below the filters. The main section is titled 'Agency AD' and shows a table of requests. The table has columns for '#', 'Process', 'Employee-', 'EIN', 'Started', 'Completed', 'Current-Task', 'Current-User', 'Status', and 'Options'. Three requests are listed in the table.

Criteria of Search

From (Request Started) To (Request Started) Agency Process Level Status

12/05/2022 02/24/2022 x AD Process Level Status

GET LIST

Agency AD

Show 25 entries Search:

#	Process	Employee-	EIN	Started	Completed	Current-Task	Current-User	Status	Options
10205	AZPerforms - Formal Employee Appraisal			02/10/2022 03:36:49 PM		Create Formal Appraisal	VERONICA DARWIN	ACTIVE	i x
10196	AZPerforms - Coaching Notes for My Direct Reports			02/10/2022 03:24:46 PM		Record Coaching Note	VERONICA DARWIN	ACTIVE	i x
10192	AZPerforms - Coaching Notes for My Direct Reports			02/10/2022 03:20:21 PM		Record Coaching Note	VICTOR CARRASCO	ACTIVE	i x

Searching Appraisals

Click on the “Agency Requests” option on the left hand side in the blue ribbon to access appraisals in your agency. The ‘current-user’ will be listed as the current owner of the request.

You are able to search by:

- Date
- Agency
- Process Level
- Status
- EIN
- Name

Criteria of Search

From (Request Started) To (Request Started) Agency Process Level Status

Agency AD

Show 25 entries Search:

#	Process	Employee-Name	EIN	Started	Completed	Current-Task	Current-User	Status	Options
10066	A2Performs - Formal Employee Appraisal	CHRISTINA WEAKLAND	149645	02/04/2022 11:33:48 AM	02/04/2022 12:07:29 PM	Completed		COMPLETED	<input type="button" value="🔗"/> <input type="button" value="📄"/>
10058	A2Performs - Formal Employee Appraisal			02/04/2022 10:01:16 AM		Create Formal Appraisal	VICTOR CARRASCO	ACTIVE	<input type="button" value="🔗"/> <input type="button" value="📄"/>

To Do Requests Tasks

Criteria of Search

From (Request Started) To (Request Started) Agency

Agency AD

Fields below can be used to searching within your agency. The example below demonstrates searching for certain employees by name.

Show 25 entries Search:

#	Process	Employee-Name	EIN	Started	Completed	Current-Task	Current-User	Status
		<input type="text" value="ALISHIA JEREMIAH"/> <input type="text" value="ANGELA HOLZWORTH"/> <input type="text" value="CAITLYN PITTMAN"/>						

Re-Assign a Formal Appraisal

This feature is utilized when the task owner is absent, on leave or on FMLA

- ❑ Agency admin can re-assign to another person to complete the action on the owner's behalf*
- ❑ Agency admin can re-assign the task to themselves (Power User ID) for task completion*
- ❑ Agency Admin can only view an In Progress appraisal by re-assigning it to themselves (power user ID, not EIN). Able to view Complete w/o reassignment.

* In both scenarios the request remains in the original organizational approval chain

On the "Agency Requests" screen use the filter options to find the appraisal that needs to be re-assigned.

On the far right of the line item you will see the re-assign logo.



Select the leader the appraisal will be re-assigned to and then click the re-assign button

Reassign request # 10058

Current Task:
Create Formal Appraisal

Current User:
VICTOR CARRASCO

Reassign to:
JODY LAUER - AD - 107800

CLOSE REASSIGN

Initiate and Assign a Formal Appraisal (Vacant Manager – Next Non-Vacant Manager)

Instructions:

1. Click the green “+Start Here” button in the top right hand corner of the screen
2. Click the blue start button next to “AZ Performs - Formal Employee Appraisal”
3. From the drop down, select your agency
4. Enter the EIN or name of ee for whom you want to initiate the appraisal
5. From the drop down, select the employee
6. Click the “Initiate & Assign” button to finish

Assigned manager will see it task in their To Do list

The screenshot shows a 'New Request' form with the following elements:

- 1**: A green '+ START HERE' button in the top right corner.
- 2**: A blue 'START' button next to the selected process 'AZPerforms - Formal Employee Appraisal ...'.
- 3**: A dropdown menu for 'Select Agency'.
- 4**: A dropdown menu for 'Select Employee'.
- 5**: A table for 'Upline Review Path' with columns: Position, Level, EMPLOYEE, FIRST NAME, LAST NAME, WORK PHONE, WORK EMAIL.
- 6**: A blue 'CREATE & ASSIGN' button at the bottom right.

Additional form fields include: AD, Employee First Name (JOHN), Employee Last Name, Employee Position Number, Employee Position Title (ELECTRICIAN), EIN, and Indirect Manager Path.

Position	Level	EMPLOYEE	FIRST NAME	LAST NAME	WORK PHONE	WORK EMAIL
	1					
	2					
	3					
	4					

Initiate and Assign a Formal Appraisal (Vacant Manager – Assign to any Appraiser)

Instructions:

1. Use steps 1- 5 from previous slide
2. Select Override Manager toggle
3. Enter the EIN/Name of the new appraiser
4. Select the new appraiser from the drop down menu
5. Validate new routing chain
6. Click the “Initiate & Assign” button to finish

Assigned appraiser will receive notification email and see the task in their To Do list

2 Override Manager

Select the override manager to route the approval to different path.

Name or EIN of the Manager

Select Override Manager

JODY LAUER -

ASSIGNED MANAGER NAME	EIN	POSITION
JODY LAUER	107800	SAD000001153

Upline Review Path

Position	Level	EMPLOYEE	FIRST NAME	LAST NAME	WORK PHONE	WORK EMAIL
SAD000000004	1		EMILY	RAJAKOVICH		
5 SAD000000001	2		ANDREW	TOBIN		
SGV000000001	3		DOUGLAS	DUCEY		

Initiate and Assign a Formal Appraisal (Non-Vacant Manager, manager is unavailable for extended period)

Instructions:

1. Click the green "+Start Here" button in the top right hand corner of the screen
2. Click the blue start button next to "AZ Performs - Formal Employee Appraisal"
3. From the drop down, select your agency
4. Enter the employee EIN/Name to search
5. Select employee from the dropdown
6. Use the Override Manager toggle to select different appraiser
7. Validate the routing chain
8. Click the "Initiate & Assign" button to finish

Assigned manager will see it task in their To Do list

Select Agency

AD

Enter Name or EIN to search or Blank is default for all employees who report to a vacant position

4 nguyen

Select Employee

5 TU NGUYEN -

Employee First Name: TU Employee Last Name: NGUYEN

Employee Position Number: SAD00000645 Employee Position Title: PROG(PRO) MGMT SR MGR (IT)

EIN:

6 Override Manager

Select the override manager to route the approval to different path.

Name or EIN of the Manager: Jody Lauer Select Override Manager: JODY LAUER

ASSIGNED MANAGER NAME: JODY LAUER EIN: 107800 POSITION: SAD00001153

Upline Review Path

Position	Level	EMPLOYEE	FIRST NAME	LAST NAME	WORK PHONE	WORK EMAIL
SAD00000004	1		EMILY	RAJKOVICH		
7 SAD00000001	2		ANDREW	TOBIN		
SGV90000001	3		DOUGLAS	DUCCY		

CANCEL

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Acknowledging A Formal Appraisal

NOTE: Only take this action when your HR Department has requested you to do so

This language is important so that it's clear that the Agency Admin acknowledged the document -- the employee didn't sign it.

Step 1: Assign the employee appraisal to your Power User ID

Step 2: Enter the **Standard Language** below into the EE Comment Box area on the Formal Appraisal

Step 3: Enter your name in the Signature Box

Standard Language: Manager and employee discussed appraisal; employee refused to acknowledge. (Admin's Name, Agency Initials, Agency Admin)

EXAMPLE: *Manager and employee discussed appraisal; employee refused to acknowledge. (Joyce Miller, ADOA Agency Admin)*

**Note - The final PDF will capture the standard language and your signature

Completed Appraisals

Once an appraisal is completed an agency admin can do the following:

- ❑ View PDF of appraisal
- ❑ Print appraisal
- ❑ Download appraisal

To the far right of the task are the icons to view, print and download the appraisal

