AZPerforms!
Agency Admin Role

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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
Logging into AZPerforms!

1. https://bpm.azdoa.gov/saml2/login
2. Enter Power User ID and password
3. Click Sign in
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 dashboard provides stats for the requests you have open. You can also filter by task status.

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<tr>
<th>#</th>
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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.
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
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
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
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
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
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
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