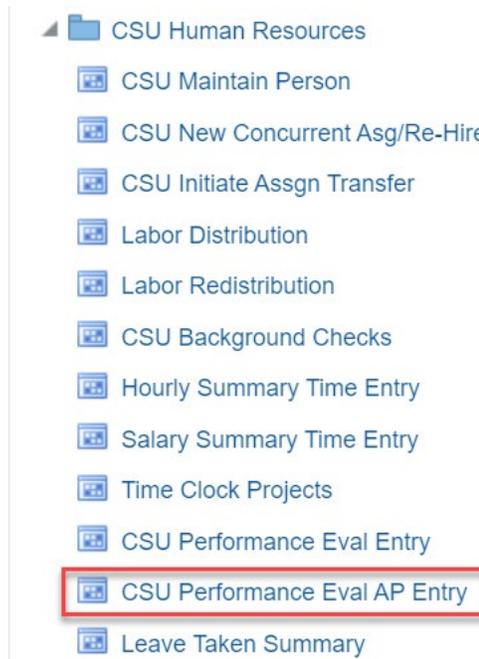


AP Performance Evaluation Entry

When performance evaluation batches for administrative professional (AP) employees are created each March, a batch is generated for each department of their AP employees active as of March 1 of that year. HR staff should enter dates of performance evaluations in these batches to affirm that an evaluation for each employee has been conducted. For technical support using this form, contact HR_IS@mail.colostate.edu.

In the Oracle HR system, open the “CSU Performance Eval AP Entry” form.

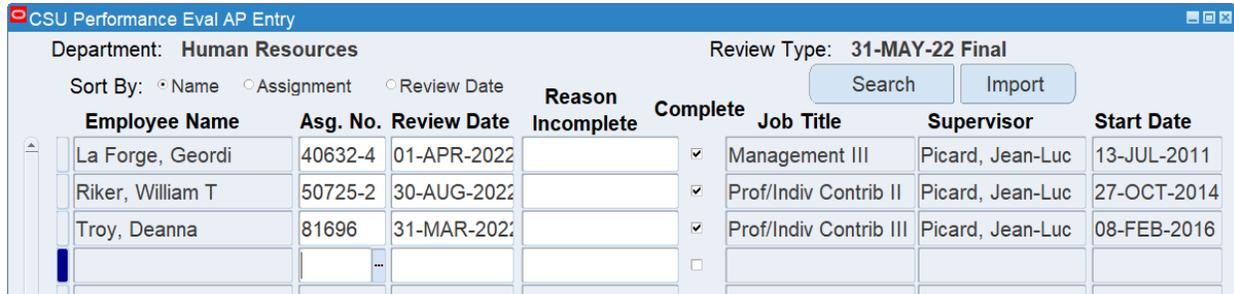


All of the department’s AP employees active as of March 1 are populated in the batch.

A screenshot of the 'CSU Performance Eval AP Entry' form. The form has a blue header bar with the title 'CSU Performance Eval AP Entry'. Below the header, there are fields for 'Department: Human Resources' and 'Review Type: 31-MAY-22 Final'. There are also 'Sort By' options (Name, Assignment, Review Date) and 'Search' and 'Import' buttons. The main part of the form is a table with the following columns: Employee Name, Asg. No., Review Date, Reason Incomplete, Complete, Job Title, Supervisor, and Start Date. The table contains three rows of data:

Employee Name	Asg. No.	Review Date	Reason Incomplete	Complete	Job Title	Supervisor	Start Date
La Forge, Geordi	40632-4			<input type="checkbox"/>	Management III	Picard, Jean-Luc	13-JUL-2011
Riker, William T	50725-2			<input type="checkbox"/>	Prof/Indiv Contrib II	Picard, Jean-Luc	27-OCT-2014
Troy, Deanna	81696			<input type="checkbox"/>	Prof/Indiv Contrib III	Picard, Jean-Luc	08-FEB-2016

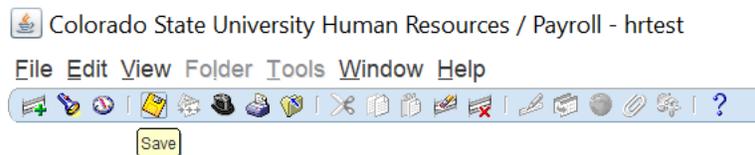
There may be cases where an AP employee should be added to the batch, such as when an employee is hired later in the year and a performance evaluation is conducted. To add an employee, click in the row after the final employee listed and either enter the assignment number or click the button with three dots in the assignment number field.



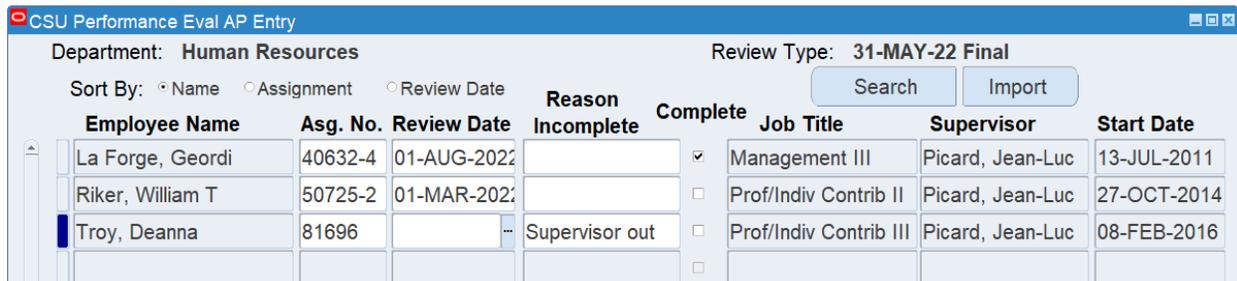
In the window that pops-up, find and select the AP employee to add click OK.



Enter the appropriate Review Date for each employee. Acceptable dates can be between January 1 and December 31 of the current year. Be sure to check the “Complete” box once the Review Date is finalized. Once that box is checked, the Review Date will be recorded on the employee’s record and the employee will be removed from the batch. You can save your entries without clicking the “Complete” box if you are not ready for the Review Dates to be captured on the employee’s record. Be sure to save your entries either way by clicking the yellow disk in the toolbar.



If there is a reason why the review isn’t complete yet, you can enter that in the Reason Incomplete field. That reason will appear in reports when HR reviews AP evaluation completion.



If an AP employee leaves your department after March 1 before a performance evaluation took place, type “Termed” in the Reason Incomplete field and check the “Complete” box. The employee will be removed from the batch within 24 hours. If an employee should be removed from the batch for any reason other termination from the department, please contact HRSAO_perf_review_final@mail.colostate.edu with the details.

CSU Performance Eval AP Entry

Department: Human Resources Review Type: 31-MAY-22 Final

Sort By: Name Assignment Review Date Search Import

Employee Name	Asg. No.	Review Date	Reason Incomplete	Complete	Job Title	Supervisor	Start Date
La Forge, Geordi	40632-4	01-AUG-2022		<input type="checkbox"/>	Management III	Picard, Jean-Luc	13-JUL-2011
Riker, William T	50725-2	01-MAR-2022		<input type="checkbox"/>	Prof/Indiv Contrib II	Picard, Jean-Luc	27-OCT-2014
Troy, Deanna	81696		Termed	<input checked="" type="checkbox"/>	Prof/Indiv Contrib III	Picard, Jean-Luc	08-FEB-2016

Importing Review Dates from a Spreadsheet

For ease of entry, assignment numbers and review dates can be entered in a spreadsheet and uploaded to the form. The format must be two blank columns, the assignment number, the review date, and two more blank columns. In Excel or other software, save the file in Comma Separated Values (csv) format.

	A	B	C	D	E	F
1	Blank	Blank	Assignment	Review Date	Blank	Blank
2			40632-4	1-Apr-22		
3			50725-2	30-Aug-22		
4			81696	31-Mar-22		

The day in the Review Date field must be two digits. You may need to open the csv file created in Notepad or other plain text editor to change any single-digit days to two-digits by adding a zero.

hr_2022_ap_evals.csv - Notepad

File Edit Format View Help

```
Blank,Blank,Assignment,Review Date,Blank,Blank
,,40632-4,1-Apr-22,,
,,50725-2,30-Aug-22,,
,,81696,31-Mar-22,,
```

*hr_2022_ap_evals.csv - Notepad

File Edit Format View Help

```
Blank,Blank,Assignment,Review Date,Blank,Blank
,,40632-4,01-Apr-22,,
,,50725-2,30-Aug-22,,
,,81696,31-Mar-22,,
```

Once the file is correctly formatted, click the Import button on the HR system form.

CSU Performance Eval AP Entry

Department: Human Resources Review Type: 31-MAY-22 Final

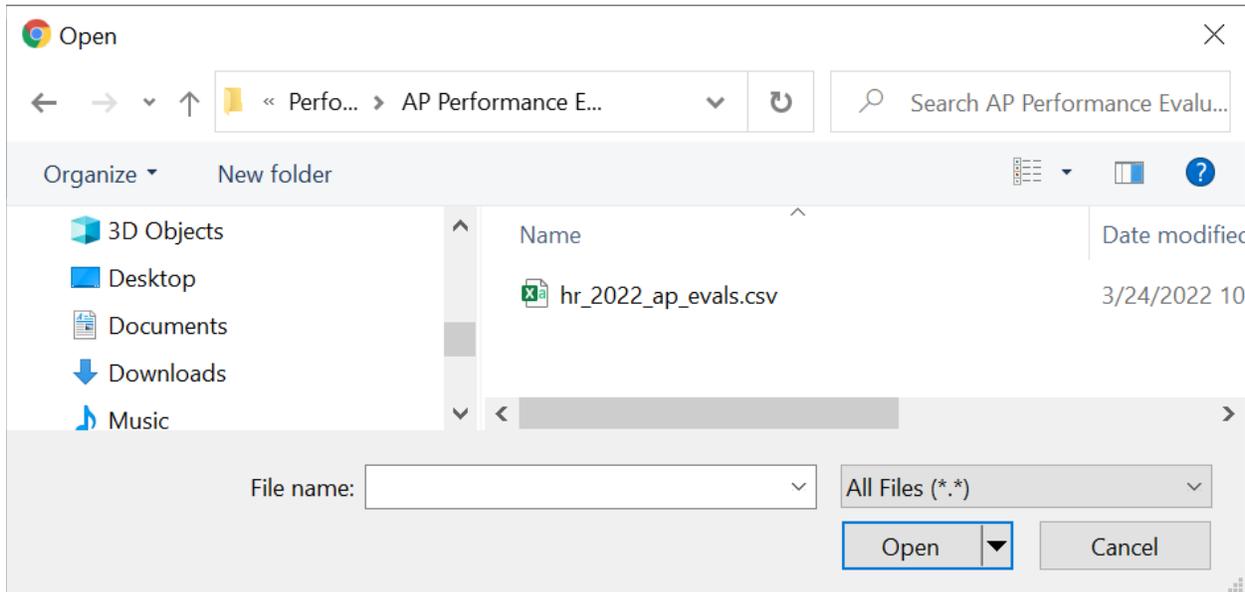
Sort By: Name Assignment Review Date Search **Import**

Employee Name	Asg. No.	Review Date	Reason Incomplete	Complete	Job Title	Supervisor	Start Date
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A new window will open in your internet browser. Click Choose File, navigate to your csv file, and click Open.

File Upload

* Upload File No file chosen



Click submit.

File Upload

* Upload File hr_2022_ap_evals.csv

A confirmation screen will appear on your internet browser. You can close the window at this point and return to the HR system Performance Eval AP Entry form.

 **Confirmation**

1. File upload completed successfully.
2. * Please close the web browser.
3. * Return to the Attachments form and click the Yes button to indicate file upload is complete.

If you received the confirmation screen, answer “Yes” to the question, “Has the file been uploaded successfully?”

CSU Performance Eval AP Entry

Department: **Human Resources** Review Type: **31-MAY-22 Final**

Sort By: Name Assignment Review Date

Search Import

Employee Name	Asg. No.	Review Date	Reason Incomplete	Complete	Job Title	Supervisor	Start Date
La Forge, Geordi	40632-4			<input type="checkbox"/>	Management III	Picard, Jean-Luc	13-JUL-2011
Riker, William T	50725-2			<input type="checkbox"/>	Prof/Indiv Contrib II	Picard, Jean-Luc	27-OCT-2014
Troy, Deanna	8169			<input checked="" type="checkbox"/>	div Contrib III	Picard, Jean-Luc	08-FEB-2016

Decision

Has the file been uploaded successfully?

Yes No

A small window will report the results of the attempted import. If you included a header row on the file, that line will report as errored, which does not cause any problems.

Note

 **Import Results**

- * Lines Updated: 3 *
- * Lines Skipped: 1 *
- * Lines Errored: 1 *

OK

The Review Date field will be completed for all rows successfully imported, and the Complete box will be automatically checked.

CSU Performance Eval AP Entry

Department: **Human Resources** Review Type: **31-MAY-22 Final**

Sort By: Name Assignment Review Date

Search Import

Employee Name	Asg. No.	Review Date	Reason Incomplete	Complete	Job Title	Supervisor	Start Date
La Forge, Geordi	40632-4	01-APR-2022		<input checked="" type="checkbox"/>	Management III	Picard, Jean-Luc	13-JUL-2011
Riker, William T	50725-2	30-AUG-2022		<input checked="" type="checkbox"/>	Prof/Indiv Contrib II	Picard, Jean-Luc	27-OCT-2014
Troy, Deanna	81696	31-MAR-2022		<input checked="" type="checkbox"/>	Prof/Indiv Contrib III	Picard, Jean-Luc	08-FEB-2016