# Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Background</td>
<td>3</td>
</tr>
<tr>
<td>PPS Modifications</td>
<td>4</td>
</tr>
<tr>
<td>Overview</td>
<td>4</td>
</tr>
<tr>
<td>New EDB Data Elements</td>
<td>4</td>
</tr>
<tr>
<td>On-Line Screens/On-Line Help</td>
<td>4</td>
</tr>
<tr>
<td>System Tables</td>
<td>6</td>
</tr>
<tr>
<td>Attachments</td>
<td>6</td>
</tr>
</tbody>
</table>
Background

The Payroll Personnel System (PPS) requirements specified in this document will be used to support the Web Merit application. Performance Evaluation Codes and Performance Evaluation Dates assigned in the Web Merit application must be associated with an employees’ appointment and stored in the PPS. PPS must be modified to allow appropriate assignment of Performance Evaluation Codes and Performance Evaluation Dates and to allow for changes in the case of data entry error. Most evaluation data will enter PPS via the batch update process however, individual update will be necessary in exception cases. As such, the new Performance Evaluation Code and Performance Evaluation Date must be accessible in PPS via a new EVAL entry/update screen and carried in history.

The Performance Evaluation Codes to be stored in PPS represent standardized base code values and not the translated local codes that are entered on the Web Merit application.
PPS Modifications

Overview

The intent of these requirements is to store the standard performance code for an employee's appointment in the Employee Database (EDB) of the Payroll/Personnel System (PPS).

The Appointment Performance Evaluation Code and Appointment Performance Evaluation Date will be entered in the Web Merit application. The batch process at the end of the merit cycle that updates employees' pay rates will also update the Appointment Performance Evaluation Code and Appointment Performance Evaluation Date. Updates to Appointment Performance Evaluation Code and Appointment Performance Evaluation Date will also be allowed using a new EDB Entry/Update screen. It is expected that access to this screen will be limited.

To accomplish this, the following modifications are required:

- Two new data elements, Appointment Performance Evaluation Code and Appointment Performance Evaluation Date, must be established on the EDB. These data elements are at the appointment level.

On-line Screen Changes

- A new EVAL screen should be created to contain the Appointment Performance Evaluation Code and Appointment Performance Evaluation Date.
- Function Code Menu screen should be revised to include the new EVAL screen.

No changes are required to Document to Employees (IDOC), Post Authorization Notification (PAN) formats, or UPAY forms.

Whenever the Appointment Performance Evaluation Code or Appointment Performance Evaluation Date is changed, they need to be captured for the History Data Base (HDB). At this time, the data will not be displayed on any history screen. If in the future users want to display the history values in a screen, then a history screen will be created for this purpose.

New EDB Data Elements

Two new data elements should be added. They are: Appointment Performance Evaluation Code (EDB 2026) and Appointment Performance Evaluation Date (EDB 2027). The Appointment Performance Evaluation Date should be stored on the EDB in standard date format (DB2-date format).

See attachments A and B for samples of the draft data dictionary page.

On-Line Screens/On-Line Help

EVAL Screen

- A new EDB entry/update screen, EVAL, should be created. The new screen will display selected appointment-level data for all appointments of the employee. These selected appointment-level data are the following: Appointment Number (EDB 2001), Appointment Begin Date (EDB 2002), Appointment End Date (EDB 2003), Title Code (EDB 2006) and
Title Code translation (use the 30-byte abbreviated translation), Appointment Department Code (EDB 2032), Appointment Performance Evaluation Code (EDB 2026), and Appointment Performance Evaluation Date (EDB 2027). All of these fields except the Appointment Performance Evaluation Code and Appointment Performance Evaluation Date should be in display-mode only. They are displayed for context only. The Appointment Performance Evaluation Code and Appointment Performance Evaluation Date are updateable fields.

- The Appointment Performance Evaluation Code is subject to range/value edits as defined by its code values in the Data Element Table.

- The Appointment Performance Evaluation Date is subject to the valid date format edit. This field is also subject to the following program edits to be performed at the user-08 and user-12 levels:
  A. When the Appointment Performance Evaluation Date is before the Appointment Begin Date, display the warning message: “PERFORMANCE EVALUATION DATE IS BEFORE APPOINTMENT BEGIN DATE.”.
  B. When the Appointment Performance Evaluation Date is after the Appointment End Date that is not indefinite (12/31/9999), display the warning message: “PERFORMANCE EVALUATION DATE IS AFTER APPOINTMENT END DATE.”.

- An edit will be performed at the same time against the Appointment Performance Evaluation Code and Appointment Performance Evaluation Date in order to ensure that both the code and date must be present if either one is entered or updated. The edit is to be performed at the user-08 and user-12 levels as an error. If both the code and date are not present if either one is entered or updated, display the error message: “PERFORMANCE EVALUATION CODE AND DATE MUST BOTH BE PRESENT.”

- A warning message will be displayed whenever a performance evaluation is entered or changed for an appointment type 5 (academic). The warning message is as follows: “PERFORMANCE EVALUATION DATA ENTERED FOR ACADEMIC APPOINTMENT.”

- The Appointment Performance Evaluation Date field will be entered in MMYY format and will be stored in the DB2-date format with the day portion of the field defaulted to ‘01’.

See attachment C for a sample of the EVAL screen.

On-Line Screen-Level Help

- On-line screen-level help for the new EVAL should be available.

See attachment D for the screen-level help text.

On-Line Field-Level Help

- On-line field-level help for each of the data elements on the EVAL screen should be available. The field-level help for the two new data elements are to be taken from the attached draft data dictionary pages.

See attachments A and B for samples of the draft dictionary page.
System Tables

Data Element Table

An entry for data element name, Appointment Performance Evaluation Code (EDB 2026) should be added to the table.

An entry for data element name, Appointment Performance Evaluation Date (EDB 2027) should be added to the table.

Because both of the above data elements are appointment level data, there is a need to define these elements for all 9 occurrences of appointment level data.

Data Elements to Screen Table

The two new data elements, Appointment Performance Evaluation Code and Appointment Performance Evaluation Date, need to be added to the Data Elements to Screen table for the EVAL function.

Code Translation Table

The Appointment Performance Evaluation Code translations will need to be added to the Code Translation Table.

Attachment A shows the various code translations.

Attachments

A. Data Dictionary sample for Appointment Performance Evaluation Code
B. Data Dictionary sample for Appointment Performance Evaluation Date
C. EVAL screen sample
D. Screen sample of screen-level help of EVAL screen
System Number: EDB2026

User Access Name:

Programming Name:

Revision Date:

Comments:

Source(s):
Use(s):
Location(s):

Name: APPOINTMENT PERFORMANCE EVALUATION CODE-EDB

Type: ALPHANUMERIC

Length: 1

Format:

N/A

General Description:

Code indicating the standard performance rating associated with an appointment.

Code Interpretation:

X  - No Performance Evaluation Conducted
1  - Fails to Meet, Unsatisfactory
2  - Partially Meets, Improvement Needed
3  - Meets Expectations, Satisfactory
4  - Exceeds Expectations, More than Satisfactory
5  - Superior, Outstanding
System Number:  EDB2027

User Access Name:

Programming Name:

Revision Date:

Comments:

Source(s):
Use(s):
Location(s):

Name:  APPOINTMENT PERFORMANCE EVALUATION DATE-EDB

Type: NUMERIC

Length: 4

Format:

MM/YY – Entry/Update

General Description:

The month and year the last performance evaluation for an appointment was conducted.

Code Interpretation:

N/A
**New Performance Evaluation Entry/Update Screen**

PPEVAL0-xxxxx                  EDB Entry/Update               02/11/02 15:23:24
02/10/02 11:21:22           Performance Evaluation         Userid: PAYMRV
ID: 000050020 Name: ABSENT,MARCUS   SSN: 555-55-5020 Pri Pay: MO

<table>
<thead>
<tr>
<th>No</th>
<th>Begin Dt</th>
<th>End Dt</th>
<th>Title Code</th>
<th>Type Dept</th>
<th>Code Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>XX MM/DD/YY</td>
<td>MM/DD/YY</td>
<td>XXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXX</td>
<td>X</td>
<td>XXXXXX</td>
<td>X MMYY</td>
</tr>
<tr>
<td>XX MM/DD/YY</td>
<td>MM/DD/YY</td>
<td>XXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXX</td>
<td>X</td>
<td>XXXXXX</td>
<td>X MMYY</td>
</tr>
<tr>
<td>XX MM/DD/YY</td>
<td>MM/DD/YY</td>
<td>XXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXX</td>
<td>X</td>
<td>XXXXXX</td>
<td>X MMYY</td>
</tr>
<tr>
<td>XX MM/DD/YY</td>
<td>MM/DD/YY</td>
<td>XXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXX</td>
<td>X</td>
<td>XXXXXX</td>
<td>X MMYY</td>
</tr>
</tbody>
</table>

Next Func: ID: Name: SSN:

```plaintext
==> F: 1- Help 3- PrevMenu 4- Print 5- Update
   F: 9- Jump 12- Exit
```
EVAL Screen-Level Help

EDBHEVAL Help EDB E U Performance Evaluation

Function: EVAL enables the user to enter and update the employee’s performance evaluation code and date for an appointment.

Nature of Information: EVAL contains the performance evaluation code and date for all of the employee's non-academic appointments eligible for merit action. The screen also contains other appointment-level data such as the appointment number, begin date, end date, title code, appointment type, and department code.

There are no highly abbreviated or group fields on EVAL.

Command ===>

F1=Help  F2=EX help  F3=eXit  F4=copy  F6=move  F7=BKwd  F8=FWd
F12=Cancel