



Public Service Performance Management Application (PSPM App): Instructions for PSPM Administrators

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Document Change Control

Revision Number	Date of Issue	Author	Revision Notes
V1.02	2020/09/11	Saumur, Alexandre	Updated the template to align with the rest of our documentation.
V1.01	2019/12/02	Saumur, Alexandre	No changes, needed to update the section "Instructions for commencing any PSPM administrator function" in the French version.
V1.00	2019/10/15	Saumur, Alexandre	Revamp of the guide.

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Introduction

Each department and agency in the Core Public Administration should assign administrators for the Public Service Performance Management Application (PSPM App). The number of administrators should be determined by the population of employee's using the PSPM App in order to be able to provide sufficient support within your department or agency.

For privacy reasons, a PSPM administrator cannot see and, consequently, cannot change the content of employee's performance agreements.

A PSPM App Administrator (PSPM admin) has privileged access to the application in order to conduct exceptional actions to be undertaken when circumstances arise outside the normal course of events.

These exceptional actions may be conducted **only when the PSPM admin has been explicitly requested to do so** by the employee and the manager/supervisor¹ who is responsible for the performance agreement of the employee in question:

- Release employee(s);
- Re-open the previous cycle's year-end;
- Close an employee's period administratively;
- Update the most recent PA date.

This document explains how PSPM admins are to use the PSPM App to perform these actions, and what managers/supervisors must do to initiate an exceptional action and PSPM admins must receive before undertaking the exceptional action.

Please note, organizations must inform the TBS Talent and Performance Management Support Team

(PM-GR@tbs-sct.gc.ca) of any changes to their list of designated PSPM admins and contact information.

1. A manager/supervisor is an employee at **any** level who is responsible for directing other employees, signing their performance agreements and assessing their work performance.

Managers'/Supervisors' Responsibilities

A manager/supervisor is responsible for requesting any of the following exceptional actions for the purposes described.

- **Release employee(s):**

- The higher-level manager/supervisor who is responsible for the manager/supervisor who cannot release his or her employees for whatever reason (extended absence, sudden departure, etc.) is to obtain the lower-level manager's/supervisor's surname, given name and government email address, and those of the direct reports to be released.
- The higher-level manager/supervisor sends an email to the PSPM admin that identifies the manager/supervisor in question and their direct reports to be released from his or her 'My Employee List', instructing the PSPM admin to release the employees and copying the employees to be released.

- **Re-open the previous cycle's year-end:**

- Discuss with the employee the need to reopen his or her year-end performance agreement.
- Send an email to the PSPM admin, copying the employee, which instructs that the employee's year-end performance agreement is to be reopened.

- **Close an employee's period administratively:**

- Send an email to the PSPM admin that identifies the employee whose period is to be closed, indicates the reason and instructs the PSPM admin to do so, copying the employee, when applicable.

- **Update the most recent PA date:**

- Confirm with the employee which cycle date should be chosen to reflect the department's or agency's performance management cycle.
- Send an email to the PSPM admin and confirm the correct cycle date the current performance agreement should be changed to.

PSPM Administrators' Responsibilities

The responsibilities of the PSPM admin in carrying out each of the exceptional actions are outlined below. He or she will carry out the actions only after receiving an email from the manager/supervisor who is responsible for the employees performance agreement, with the employee copied, instructing him or her to do so.

- **Release employee(s):**
 - Obtain an email from the higher-level manager/supervisor who is responsible for the manager/supervisor who has direct reports who must be released. The email must identify the lower-level manager/supervisor and provide his or her surname, given name and government email address, and it must direct that the employee's reporting to that individual be released. The surnames, given names and government email addresses of the employees to be released must also be provided.
 - Confirm that the employees to be released have been copied on this email.
 - Carry out the action.
 - Send an email to the initiating manager/supervisor, copying the employees, confirming that the employees have been released.

- **Re-open the previous cycle's year-end:**
 - Obtain an email from the responsible manager/supervisor that identifies the employee in question, directs that the employee's year-end performance agreement is to be reopened.
 - Confirm that the employee has been copied on this email.
 - Carry out the action.
 - Send an email to the responsible manager/supervisor, copying the employee, confirming that the performance agreement in question has been reopened.

- **Close an employee's period administratively:**
 - Obtain an email from the responsible manager/supervisor that identifies the employee whose period is to be closed, and indicates the reason.
 - Confirm that the employee has been copied on this email, when applicable.
 - Carry out the action.
 - Send an email to the manager/supervisor, copying the employee when applicable, confirming that the agreement has been closed by the PSPM admin and specify the reason identified by the manager.

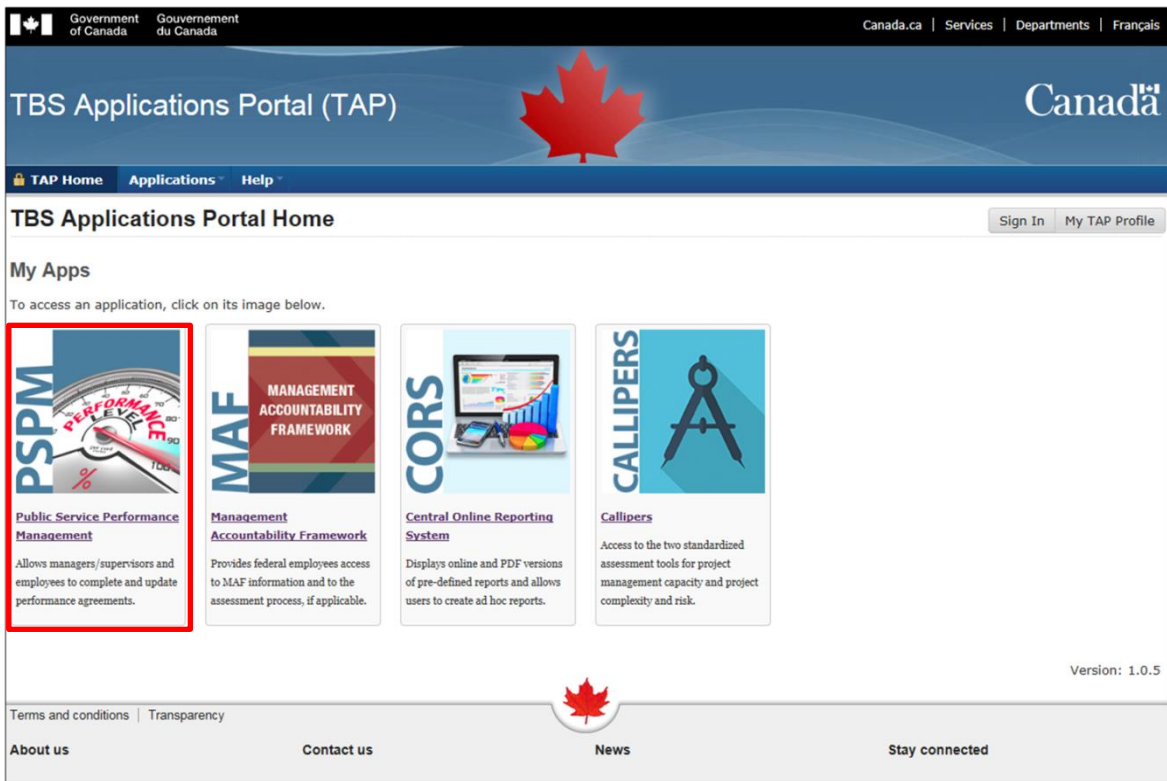
- **Update the most recent PA date:**
 - Discuss with the manager which cycle date should be chosen to reflect the department's/agency's performance management cycle.

Instructions for PSPM Administrators

To CARRY OUT ANY PSPM ADMIN FUNCTIONS, FOLLOW THESE INITIAL STEPS:

TBS Applications Portel Home Page (TAP)

Click on the PSPM App and log in using your MyKey filename and password.



If you are registered with the application as a PSPM admin, “PSPM Administrator” will appear in the horizontal menu at the top of the application. Click on it.



INSTRUCTIONS FOR COMMENCING ANY PSPM ADMINISTRATOR FUNCTION

To perform any of the exceptional actions, first search for the name of the employee for which to perform the action:

- Enter the person's surname and given name², and click "Find".
- Under "Search Results," click the radio button beside the name of the person. Then click "Select Employee."
- In a new screen, the overall structure will appear.

PSPM administrators cannot search themselves and perform actions on their own account.

If the employee's name does not appear, check the spelling of the name. If you are still unable to find the individual in the PSPM App, contact him or her to confirm how he or she is registered in the application (i.e., determine whether his or her surname has a hyphen, an accented character, etc.).

The screenshot displays the PSPM Administrator interface. At the top, there is a navigation bar with tabs: TAP Home, My Performance Agreements, My Employee Performance Agreements, and PSPM Administrator. Below the navigation bar, the page title is "PSPM Home > Employees" and the user is logged in as "Welcome". There are links for "Settings" and "Exit PSPM (return to TAP)".

The search section includes a "Search" input field with a search icon. Below it, there are two input fields: "Surname (minimum 1 characters) (required)" with the value "smith" and "First Name" with the value "a". A "Find" button is located below these fields.

The "Search Results" section shows a table with the following data:

	Surname	Given Name	Email Address
<input type="radio"/>	Smith	A	a.smith@email.com

A "Select Employee" button is located below the table. A red circle highlights the "Find" button, and a red arrow points from it to the "Select Employee" button. Another red circle highlights the radio button in the search results table.

² You may enter only one character of the surname and given name in the search boxes.

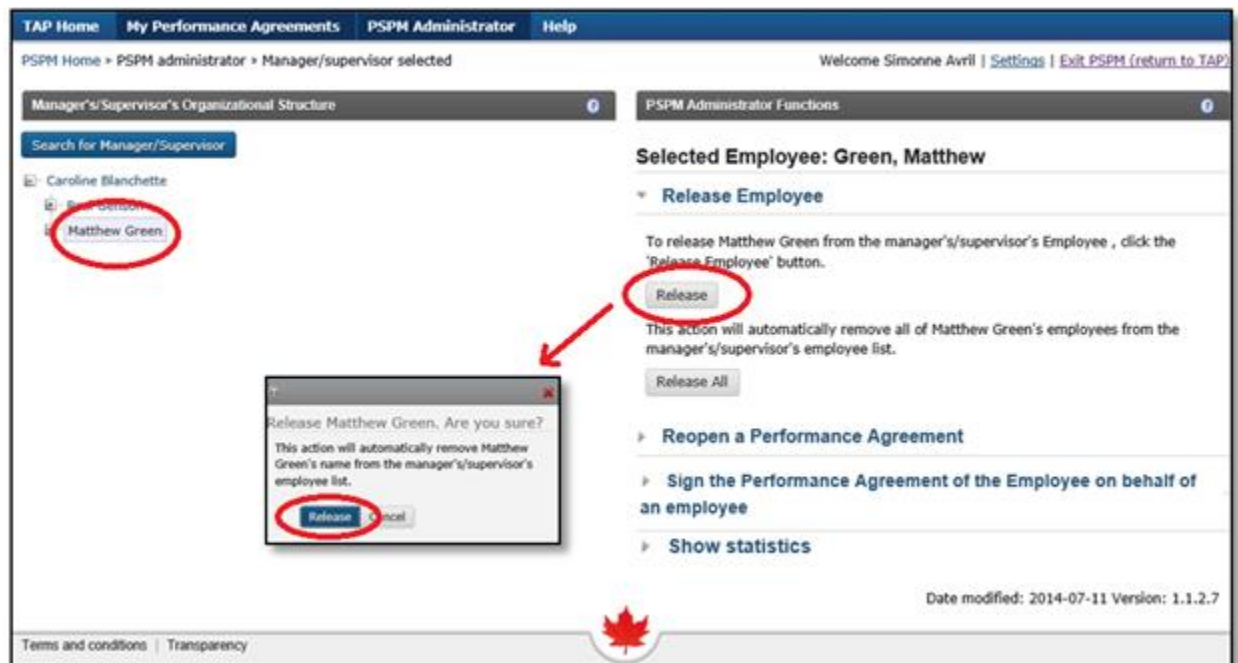
RELEASE EMPLOYEE(S)

Reflects a change in reporting in the PSPM App when the responsible manager/supervisor is unable to do so.

If the manager has no employee(s) under him, the “Release” button won’t appear.

After clicking “Select employee”:

- If you have been authorized to release only one employee, search for the employee. Click the name of the employee who is to be released. Open the “Release Employee” menu on the right and then click “Release.”
- If you have been authorized to release all of a manager’s/supervisor’s employees, search for the manager/supervisor and click on their name. Open the “Release Employee” menu on the right and then click “Release All”.
- You will be prompted to confirm the action.



TAP Home My Performance Agreements PSPM Administrator Help

PSPM Home > PSPM administrator > Manager/supervisor selected Welcome Simone Avril | [Settings](#) | [Exit PSPM \(return to TAP\)](#)

Manager's/Supervisor's Organizational Structure

Search for Manager/Supervisor

- Caroline Blanchette
- Paul Genson
- Matthew Green

PSPM Administrator Functions

Selected Employee: Blanchette, Caroline

Release Employee

To release Caroline Blanchette from the manager's/supervisor's Employee , click the 'Release Employee' button.

Release

This action will automatically remove all of Caroline Blanchette's employees from the manager's/supervisor's employee list.

Release All

Show statistics

Release all employees. Are you sure?

This action will automatically remove all of Caroline Blanchette's employees from the manager's/supervisor's employee list.

Release All Cancel

Date modified: 2014-07-11 Version: 1.1.2.7

Terms and conditions | Transparency

TAP Home My Performance Agreements My Employee Performance Agreements PSPM Administrator

PSPM Home > Selected Employee Welcome | [Settings](#) | [Exit PSPM \(return to TAP\)](#)

Search

Search for Employee

- Smith

Functions

Selected Employee: Smith, A

Release Employee

The selected employee is not a manager and does not have any employees to release.

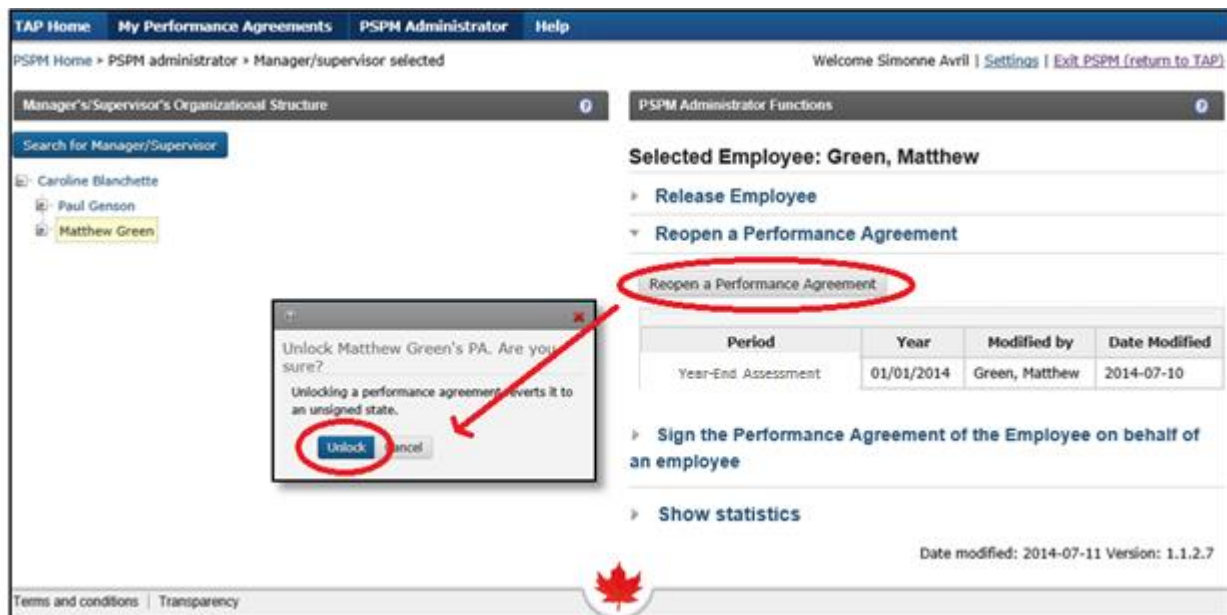
RE-OPEN THE PREVIOUS CYCLE'S YEAR-END

Allows revisions when both the manager/supervisor and his or her employee have completed the performance agreement and checked the signature box.

If the button "Reopen a Performance Agreement" doesn't exist, it means the performance agreement is already open or has only been signed by the manager, in which case the manager can remove his signature in Section E.

After clicking "Select employee":

- Click the name of the employee whose year-end performance agreement is to be reopened. If there is a performance agreement in a completed status, you will find it in the menu to the right entitled "Reopen a Performance Agreement".
- Click "Reopen Performance Agreement."
- You will be prompted to confirm the action.



The screenshot displays the PSPM Administrator interface. The top navigation bar includes "TAP Home", "My Performance Agreements", "PSPM Administrator", and "Help". The main content area is titled "Manager's/Supervisor's Organizational Structure" and "PSPM Administrator Functions". The "Selected Employee: Green, Matthew" section is active, showing a list of actions: "Release Employee", "Reopen a Performance Agreement", "Sign the Performance Agreement of the Employee on behalf of an employee", and "Show statistics". The "Reopen a Performance Agreement" button is circled in red. Below this button is a table with the following data:

Period	Year	Modified by	Date Modified
Year-End Assessment	01/01/2014	Green, Matthew	2014-07-10

A confirmation dialog box is open, asking "Unlock Matthew Green's PA. Are you sure?". The dialog box text reads: "Unlocking a performance agreement reverts it to an unsigned state." The "Unlock" button is circled in red. The footer of the page includes "Terms and conditions | Transparency" and a date modified: 2014-07-11 Version: 1.1.2.7.

CLOSE AN EMPLOYEE'S PA ADMINISTRATIVELY

When the employee refuses to sign the performance agreement or is unable to do so (i.e., on leave without pay, retirement).

- If the PSPM admin closes a period using the reason "Employee refuses to sign", the next period³ of the agreement will be created automatically.
- For any other reason, the next period **will not be generated** by the system.

Prior to this action, the employee's PA needs to be completed and signed by the manager.

A performance agreement can only be closed under one of the following reasons:

- Employee refuses to complete the agreement;
- Extended paid leave;
- Extended unpaid leave;
- Employee has left the Core Public Administration;
- Employee has left the Federal Government.

After clicking "Select employee":

- Click the name of the employee whose performance agreement is to be closed. If there is a performance agreement in a "signed by the manager" status, you will find it in the menu to the right entitled "Sign the Performance Agreement of the Employee on behalf of an employee".
- Click "Sign the Performance Agreement".
- You will be prompted to select the reason and confirm to change the status.

³ Unless the period closed administratively was the year-end.

Employee's Organizational Structure

Search for Employee

Caroline Blanchette

Functions

Selected Employee: Blanchette, Caroline

▼ Release Employee

This action will automatically remove all of Caroline Blanchette's employees from the manager's/supervisor's employee list.

Release all

► Reopen a Performance Agreement

► Sign the Performance Agreement of the Employee on behalf of an employee

Sign the Performance Agreement

Period	Year	Modified by	Date Modified
Mid-Year Review	01/04/2014	Avril, Simonne	2015-02-06

► Show statistics

Change status. Are you sure?

This action will automatically change the status on the employee's performance agreement from from **Signed by the Manager/Supervisor** to **Closed by the PSPM administrator**.

Reason

Employee refuses to complete the agreement

- Extended paid leave = pre-retirement use of leave, use of banked sick leave, full-time language training and interchange out
- Extended unpaid leave = Maternity Leave, Parental Leave, Leave for the Care of Family, etc
- Employee has left the Core Public Administration = Transferred to a separate employer, etc.
- Employee has left the Federal Government = Retirement, new employment in the private sector, etc.

Change Status Cancel

UPDATE THE MOST RECENT PA DATE

When the manager/supervisor has created the most recent performance agreement with the incorrect cycle date.

Only available for the **most recent PA** and it needs to be in the status **“In Progress”** or **“Signed by manager/supervisor”**.

After clicking **“Select employee”**:

- Click the name of the employee whose performance agreement cycle date is to be changed. The view of the employee’s performance agreements will be found in the menu to the right entitled **“Update Performance Agreements”**.
- Select the desired cycle from the drop-down menu under **“Fiscal year start”** and click on **“Update PA Date”**.
- You will be prompted to confirm the action.

The screenshot displays the PSPM Administrator interface for a selected employee, A. Smith. The 'Update Performance Agreements' section is active, showing a list of performance agreement fiscal years. The 'Fiscal year start' dropdown is set to 2017-04-01. A table below shows the status of performance agreements for the 2017-04-01 fiscal year. The 'In progress' and 'Signed by manager/supervisor' statuses are highlighted with red circles. The 'Update PA Date' button is visible at the bottom right of the table.

Header_Period	Status
Year-End Assessment	In progress
Mid-Year Review	Signed by manager/supervisor
Beginning of the Assessment	Completed

Header_Period	Status
Year-End Assessment	Completed
Mid-Year Review	Completed
Beginning of the Assessment	Completed