Treasury Board of Canada
Secretariat

Secrétariat du Conseil du Trésor
du Canada

Canada

Public Service Performance Management Application (PSPM):

Instructions for PSPM Administrators

Office of the Chief Human Resources Officer (OCHRO)

Updated on April 6, 2022

Document Change Control

Revision Number	Date of Issue	Author	Revision Notes
V1.03	2022/04/05	Saumur, Alexandre	Addition of the following sections: - Information on OPIs. - PSPM administrator access requests. - CORS access requests. - Requests for performance agreements from labour relations, employees or ATIP. - Frequently asked questions. - External resources. Reorganization of the sections associated to the PSPM administrator functionalities.
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.

Table of Content

Introduction

Each organization using the Public Service Performance Management (PSPM) application must identify individuals as an Office of Primary Interest (OPI). The latter are responsible for identifying users requiring the role of PSPM administrator within their organization. The number of administrators should be determined according to the number of employees using the PSPM application to be able to provide sufficient support within your organization.

The PSPM administrator has privileged access to the application to perform actions in special circumstances.

Note:

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

These actions can only be performed when the employee and the manager[1] who is responsible for the performance agreement of the employee in question **have explicitly asked the PSPM administrator to do so**:

- Release one or more employees
- Open the year-end of the last cycle on the employee's file
- Administratively close a period of an employee's performance agreement
- Update the "In Progress" performance agreement cycle date

This document explains how PSPM administrators should use the application to perform these actions, as well as what managers should do to request any of these actions and what PSPM administrators should obtain before performing them.

In the event that an employee has not yet transferred to your organization on the TBS Application Portal (TAP), the administrator will need to send a service request to our support team (EHRIassistanceISRH@tbs-sct.gc.ca) stating that the action cannot be performed and specifying the details of the action so that we can perform it on our end.

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

Managers' Responsibilities

A manager is responsible for requesting any of the following four actions for the stated purposes.

- **Release one or more employees:**

    - The higher-level manager who is responsible for the manager who cannot release their employees for whatever reason (extended absence, sudden departure, etc.) is to obtain the lower-level manager's surname, given name and government email address, and those of the direct reports to be released.

    - The higher-level manager sends an email to the PSPM administrator that identifies the manager in question and their direct reports to be released from their employee list, instructing the PSPM administrator to release the employees and copying the employees to be released.

- **Open the year-end of the last cycle on the employee's file:**

    - Discuss with the employee the need to re-open their year-end evaluation from the last cycle on file.

    - Send an email to the PSPM administrator, copying the employee, instructing them to re-open the year-end evaluation from the last cycle on the employee's file.

- **Administratively close a period of an employee's performance agreement:**

    - Complete and sign the employee's period in the PSPM application.

    - Send an email to the PSPM administrator, copying the employee, mentioning the name of the employee whose period must be closed and specifying the reason for the closure.

- **Update the "In Progress" performance agreement cycle date:**

    - Confirm with the employee which cycle date should be chosen to reflect the organization's performance management cycle.

    - Send an email to the PSPM administrator, copying the employee, and confirm the cycle.

PSPM Administrators' Responsibilities

The responsibilities of the PSPM administrators in carrying out each of the actions are described below. PSPM administrators will take the following actions only after receiving an email from the manager responsible for the employee's performance agreement (with a copy to the latter), instructing him to take this action. Note that the employee must be claimed by the manager in the myEmployees application.

- **Release one or more employees:**
  - Obtain an email from the higher-level manager who is responsible for the manager whose employees who report directly to him need to be released. The email must identify the targeted lower-level manager and provide their surname, given name and government email address and must direct that the employees reporting to that individual be released. The surname, given name and government email address of the affected employees must also be provided.
  - Confirm that the employees have been copied on the manager's email.
  - Carry out the action.
  - Send an email to the responsible manager, copying the employees, to confirm that the employees have been released.

- **Open the year-end of the last cycle on the employee's file:**
  - Obtain an email from the manager in charge identifying the employee in question, giving the instruction to open the year-end of the last cycle on the employee's file.
  - Confirm that the employee has been copied on the manager's email.
  - Carry out the action.
  - Send an email to the responsible manager, copying the employee, confirming that the year-end of the last cycle on the employee's file has been opened.

- **Administratively close a period of an employee's performance agreement:**

  - Obtain an email from the responsible manager identifying the employee whose period must be closed and indicating the reason.

  - Confirm that the period has been completed and signed by the manager.

  - Confirm that the employee has been copied on this email.

  - Carry out the action.

  - Send an email to the manager, copying the employee, confirming that the period has been closed under the reason identified by the manager.

- **Update the "In Progress" performance agreement cycle date:**

  - Discuss with the manager to determine the appropriate date for the cycle in question.

Office of Primary Interest's (OPI) Responsibilities

The Office of Primary Interest represents and supports the performance management program within an organization. Essentially, the OPI is responsible for running the performance and talent management (PTM) program within their organization. An OPI is designated by the Head of Human Resources of their organization. Organizations often nominate a Human Resources Director or Senior Advisor for these responsibilities. This person is not necessarily the person that administers the PSPM application, but can be, depending on how the organization sets up their PTM office. It is possible to designate more than one employee per organization as OPI.

Responsibilities:

- To manage access permissions of the PSPM administrator role in PSPM for their organization. The OPI's consent must be attached to such service requests.

- To receive employees PAs through encrypted emails when such requests are sent to our support team.

- To share any information sent by the Treasury Board of Canada Secretariat with their organization's PSPM administrators.

Instructions for PSPM Administrators

ADD OR REVOKE THE ROLE OF OPI

To modify your organization's OPIs, we must obtain a list of employees to be added or removed that has been approved by your Head of Human Resources. Subsequently, this approval email must be forwarded to our support team (EHRIassistanceISRH@tbs-sct.gc.ca); please include the names and email addresses of the listed employees.

If you are unsure of your organization's OPIs, you can contact our support team to obtain a list of your designated OPIs.

ADD OR REVOKE ADMINISTRATOR ACCESS

For any modifications to your organization's PSPM administrator access, please provide the name and PRI of the employees. Also, please ensure that the request has been approved by your OPI. **Any request sent without the approval of your OPI will be refused.**

Notes:

- An employee does not need to be transferred to your organization on the TAP to obtain administrator access.

- It is possible to assign administrator access to more than one organization when your organization is in a situation where this is necessary. In these situations, please mention the names of the organizations the employee should have access to.

MODIFY ACCESS TO CORS

To change your access to Central Online Reporting System (CORS), please complete this form. This must be signed by your Head of Human Resources electronically or on paper. Instructions are attached to the form.

In the event that it is not possible to sign electronically or on paper, a confirmation email from the Head of Human Resources with the completed form attached is sufficient and should be forwarded to our support team.

Please note that once access has been given to employees, a delay of 1 or 2 days is required for the access to be reflected within the employee's account on the TAP.

Note:

- Since we have a limited number of licenses for CORS, each organization can assign access to a maximum of 3 employees.

REQUESTS TO OBTAIN PERFORMANCE AGREEMENTS

LABOUR RELATIONS

When a Labour Relations Advisor in your organization wishes to obtain an employee's performance agreements, please ensure that you attach the Labor Relations Advisor's formal request with their official signature block as an attachment to your request to the support team.

Subsequently, the agreements will be sent directly to the Labor Relations Advisor via an encrypted email. You will then be informed that everything has been provided.

EMPLOYEE DOES NOT HAVE ACCESS TO THE SYSTEM

An employee who does not have access to the application can request their performance agreements from TBS through an online Access to Information and Privacy (ATIP) request.

Please note that we offer alternative support through the OPIs. The employee must consent to having their performance agreements sent via encrypted email to one of your OPIs. However, please be sure to confirm the identity of the individual.

Thereafter, please provide the employee's consent and the name of the OPI to whom to send everything as an attachment to your request. You will then be responsible for providing the information to the employee according to your organizational protocols for the management of Protected B information.

ACCESS TO INFORMATION AND PRIVACY (ATIP)

For all requests from your Access to Information and Privacy (ATIP) unit, please inform them that they must contact the responsible unit (ATIP) at TBS directly (list of access to information and privacy coordinators by institution).
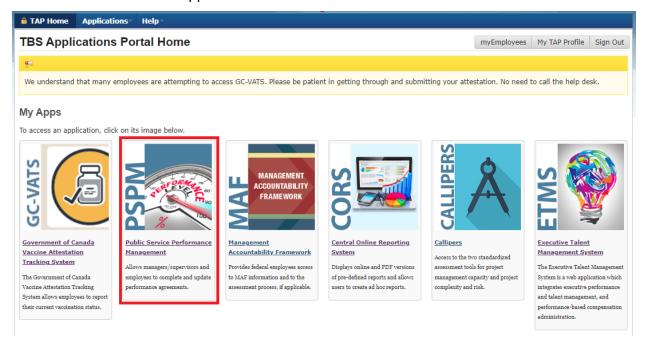
Note:

- No ATIP request should be sent to the support team.

TO ACCESS THE PSPM ADMINISTRATOR FUNCTIONALITIES

Please follow these steps:

1. Log in to the TBS Application Portal (TAP).

2. Click on the PSPM application.
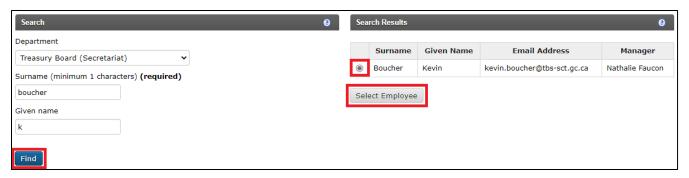

3. Click on the tab **PSPM Administrator**.

INSTRUCTIONS FOR LAUNCHING **PSPM** ADMINISTRATOR FEATURES

To perform any of the features on an employee's account, you need to find the responsible manager:

1. Enter the manager's surname and given name[2], and click **Find**.

2. Under the **Search Results** section on the right, select the radio button beside the manager's name. Then click on the button **Select Employee**.

3. Subsequently, the hierarchical structure of the manager will be displayed on the left.

4. Select the employee in the manager reporting structure.

Notes:

- 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 application, contact them to confirm how they are registered in the application (i.e., determine whether their surname has a hyphen, an accented character, etc.).
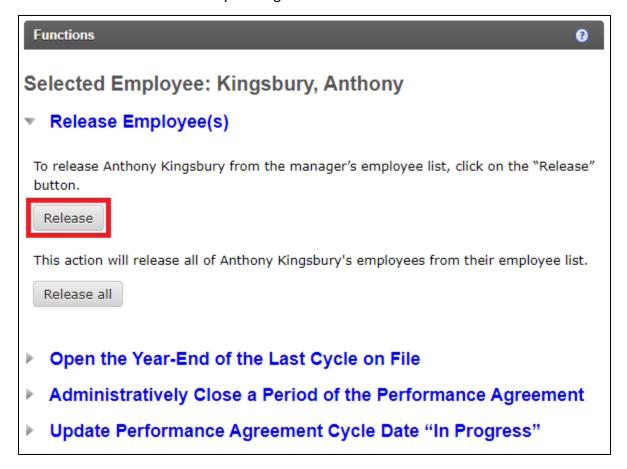
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[2] You may enter only one character of the surname and given name in the search boxes.

RELEASE AN EMPLOYEE OR ALL THE EMPLOYEES OF A MANAGER

RELEASE AN EMPLOYEE

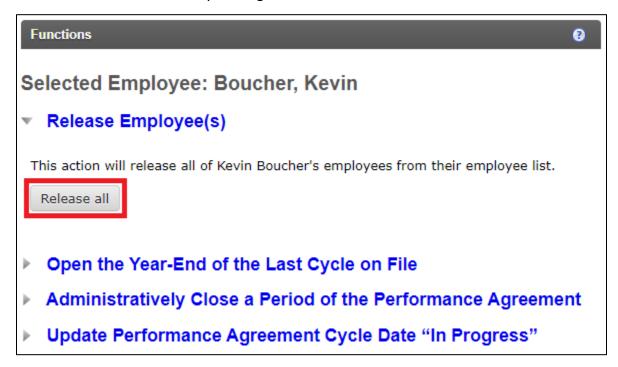**After selecting the employee in the hierarchical structure of the manager:**

1. See the **Release Employee(s)** section on the right.

2. Click the **Release** button.

3. Confirm the action by clicking the **Release** button.

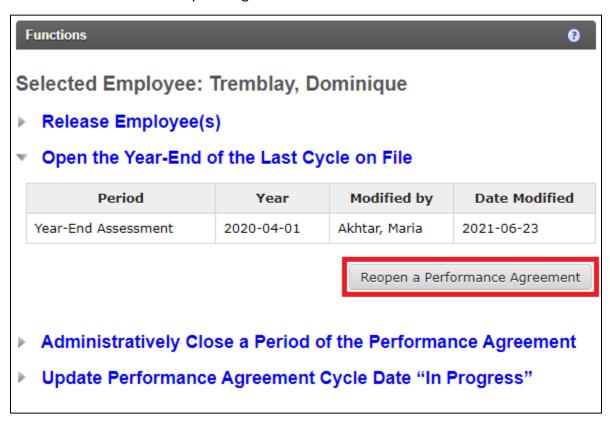**After selecting the manager in the hierarchical structure:**

1. See the **Release Employee(s)** section on the right.

2. Click the **Release All** button.

3. Confirm the action by clicking the **Release All** button.

After selecting the employee in the hierarchical structure of the manager:

1. See the **Open the Year-End of the Last Cycle on File** section on the right.

2. Click the **Reopen a Performance Agreement** button.

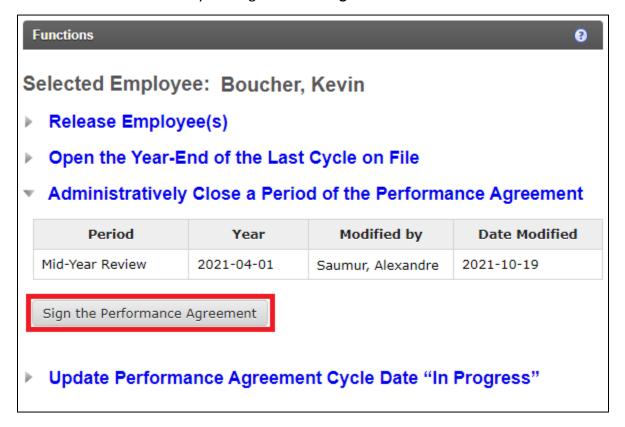3. Confirm the action by clicking the **Unlock** button.

Note:

- If you don't see a performance agreement to open, the performance agreement is already open or has only been signed by the manager. In this case, the manager may withdraw their signature by unchecking the boxes related to their signature in Section E of the employee's performance agreement.

ADMINISTRATIVELY CLOSE A PERIOD OF AN EMPLOYEE'S PERFORMANCE AGREEMENT

After selecting the employee in the hierarchical structure of the manager:

1. See the **Administratively Close a Period of the Performance Agreement** section on the right.

2. Click the **Sign the Performance Agreement** button.

3. Select the reason for the administrative closure.

4. Confirm the action by clicking on the **Change Status** button.

Functions				?

Selected Employee: Boucher, Kevin

▷ **Release Employee(s)**

▷ **Open the Year-End of the Last Cycle on File**

▽ **Administratively Close a Period of the Performance Agreement**

Period	Year	Modified by	Date Modified
Mid-Year Review	2021-04-01	Saumur, Alexandre	2021-10-19

Sign the Performance Agreement

▷ **Update Performance Agreement Cycle Date "In Progress"**

Notes:

- Prior to performing this action, the employee agreement must be completed and signed by the responsible 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

- If the PSPM administrator closes a period using the reason **Employee refuses to complete the agreement**, the next period[3] of the agreement will be created automatically.

    - For any other reason, the next period **will not be generated** by the system.

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[3] Unless the administratively closed period is the year-end assessment.

After selecting the employee in the hierarchical structure of the manager:

1. See the **Update Performance Agreement Cycle Date "In Progress"** section on the right.

2. Under the cycle containing a period **In progress** or **Signed by manager**, select the date of the desired fiscal year.

3. Click on the **Update PA Date** button.

4. Confirm the action by clicking on the **Save** button.

Note:

- This feature is only available when a performance agreement has not been completed. One of the periods associated to the cycle must be in one of the following statuses: **In progress** or **Signed by manager**.

Frequently Asked Questions

1. TAP PORTAL

1.1 THE USER MENTIONS THAT NO EMAIL IS SENT BY THE SYSTEM

Please ensure that the user has updated their email address within their TAP profile. It is possible to check the employee's email by searching for it in the myEmployees application.

1.2 THE USER ENCOUNTERS PROBLEMS RELATED TO THE TAP PORTAL

Please refer to the following guide: TAP - Instructions for PSPM Administrators to Support Their Users [FR].

2. PSPM APPLICATION

2.1 UNDER THE "SETTINGS" LINK, WHAT ARE THE DIFFERENCES BETWEEN THE ROLES?

- **Executive or a deputy minister:** The user will be able to consult the performance agreements of their employees but will not be able to have a performance agreement created in their name. As soon as a user identifies themselves under this role, their performance agreements are no longer visible to them or to the PSPM administrators.

- **Manager:** The user will be able to view the performance agreements of their employees and will be able to have performance agreements created in their name.

- **Employee:** The user can only view their performance agreements.

Note:

- A user can modify their role at any time by clicking on the **Settings** link and saving a new role.

2.2 WHAT IS THE RETENTION PERIOD FOR PERFORMANCE AGREEMENTS?

The TBS performance and talent management data retention guidelines stipulate that data found within the PSPM application will be retained for 5 years from the date of the last administrative action, after which it will be deleted.

However, due to ongoing litigation, we cannot delete the data in question at this time.

2.3 A MANAGER IS UNABLE TO CREATE A PERFORMANCE AGREEMENT BECAUSE THE "ADD A PERFORMANCE AGREEMENT" BUTTON IS GRAYED

The system does not allow an employee to have several cycles open simultaneously. The manager and/or employee must therefore complete all the periods that are under the status **In progress** or **Signed by manager** before being able to create a new performance agreement.

For a cycle to be considered completed, the three periods must be signed by the manager and the employee **or** the most advanced period must be closed administratively under one of the following reasons: Extended paid leave, Extended unpaid leave, The employee has left the Core Public Administration or The employee has left the Federal Government.

2.4 CAN A MANAGER WITHDRAW HIS SIGNATURE?

As long as the employee has not signed, the manager can go to **Section E** to uncheck the boxes associated to their signature.

Afterwards, the manager only must save the page and the period will be reopened. It is recommended that the manager and the employee clean up the temporary files[4] of their browsers after saving to avoid any technical issues with the application.

2.5 THE MANAGER IS NOT CAPABLE OF MODIFYING THE OVERALL RATING OF SECTION E

The overall rating generated in **Section E** is based on a matrix that uses the ratings from Section B and C. The manager must therefore adjust the ratings from these two sections to change the overall rating.
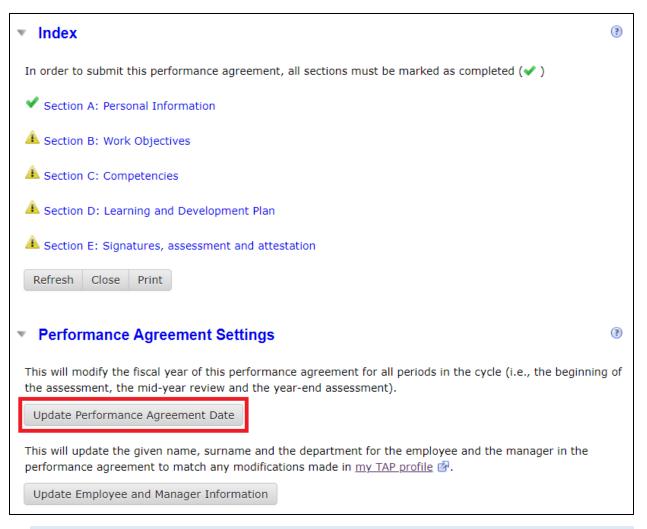
2.6 THE MANAGER CREATED A PERFORMANCE AGREEMENT UNDER THE WRONG FISCAL YEAR

A PSPM administrator can change the date of a performance agreement if the employee is attached to your organization on the TAP and one of the periods associated with the cycle is under the **In progress** or **Signed by manager** status. Please refer to section Update the "In Progress" Performance Agreement Cycle Date for more details.

The manager is also able to modify the date of the cycle in progress by following the following steps:

1. Select the period under the **In progress** or **Signed by manager** status associated with the cycle.

2. Navigate to the **Performance Agreement Settings** section.

3. Click the **Change Performance Agreement Date** button.

4. Select the desired fiscal year date.

5. Click on the **Update** button.

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[4] Browser temporary files can be cleaned using the following command: CTRL+F5.

2.7 Employee is not able to update section A

The employee can only edit the **Performance Agreement Language Preference** subsection. As for the rest of the section, only the manager can modify the content.

2.8 Manager is unable to complete section A due to missing group and level

Managers should enter their own group and level at the bottom of **Section A**.

2.9 Manager wishes to re-open the beginning of year to modify the employee's work objectives

The manager is able to delete work objectives or identify them as **Work objective no longer required** during the midyear and year-end exercise in a situation where these have changed during the year.

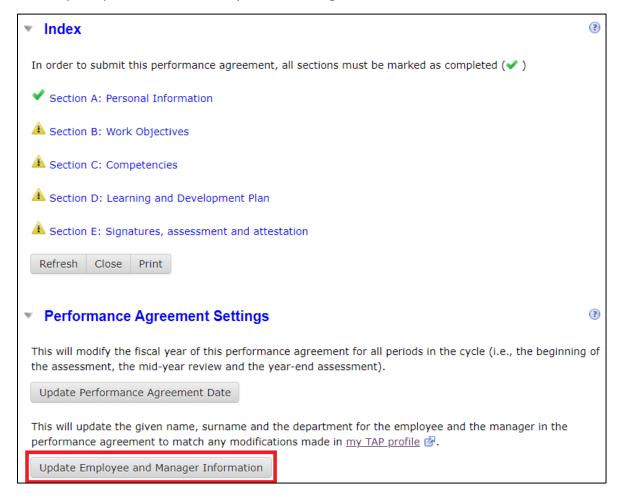**2.10 THE NEXT PERIOD OF THE EMPLOYEE'S CYCLE HAS NOT GENERATED**

If for some reason one of the periods of the current cycle (midyear or year-end) has not been generated by the system, please send us a request specifying the period to be created for the employee.

However, please consult the section on administrative closures for more details on the generation of periods following administrative closures.

2.11 EMPLOYEE HAS JUST BEEN TRANSFERRED, BUT THE ORGANIZATION WITHIN SECTION A IS INCORRECT

If the employee was transferred to your organization on TAP, the manager should go to the current period index, open the subsection **Performance Agreement Settings** and click on the button **Update Employee and Manager Information**.

It is recommended that the manager and employee clear their Internet browser's temporary files[5] to ensure they see the changes.

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[5] Browser temporary files can be cleaned using the following command: CTRL+F5.

External Resources

FORMS AND RESOURCES

- [Support Request Form](#)

- [CORS - Micro-Data Authorization Form](#) [[FR](#)]

- [TAP - Instructions Support Your Users](#) [[FR](#)]

- [Instructions on How to Encrypt and Digitally Sign a File](#) [[FR](#)]

- [Contact List](#)

- [GCconnex – Performance and Talent Management Advisors Network](#)

- [GCcollab – Performance and Talent Management Advisors Network](#)

INSTRUCTIONS FOR YOUR USERS

- [How to Claim an Employee](#) [[FR](#)] ([accessible version](#) [[FR](#)])

- [How to Accept or Refuse a Claim Request](#) [[FR](#)] ([accessible version](#) [[FR](#)])

- [How to Update Section A in the PSPM Application](#) [[FR](#)] ([accessible version](#) [[FR](#)])