

# SUPERVISORY EMPLOYEE PERFORMANCE REPORT

## QUICK START GUIDE

### REPORT BACKGROUND

The Supervisory Employee Performance Report (EPR) provides an overview of individual VSR and RVSR transactional, quality, training, and deferral performance statistics in one easy to reference location.

The report is maintained by the Office of Performance Analysis & Integrity's (PA&I) Business Intelligence (BI) Team.

### ACCESSING THE APPLICATION

The Supervisory EPR can be accessed by clicking the following hyperlink: [Supervisory Employee Performance Report](#). It can be saved as a "Favorite" in the Microsoft Internet Explorer web-browser which allows for easy access in the future. *This report does not require additional passwords or usernames.*

The report can also be accessed through [VBA Intranet Home page](#) by following the steps below

#### Step 1) Navigate to the PA&I Intranet site



Step 2) At the PA&I Intranet site, navigate to the Tableau Server link.

**OFFICE OF PERFORMANCE ANALYSIS & INTEGRITY (OPA&I) 20B**

The vision of PA&I is to be the most credible and responsive source of accurate data related to the delivery of Veterans benefits.

**Top PA&I Deliverables**

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- [Aspire Dashboard](#)
- [Appeals Monthly Reports](#)
- [Daily Snapshot](#)
- [Directors Performance Dashboard](#)
- [OBIEE \(NEXUS, MyCORE\)](#)
- [Monday Morning Workload Report\(MMWR\)](#)
- [Monthly Workload](#)
- [Reports Hub](#)
- [Tableau Server \(TTC/ETR, Appeals\)](#)

**PA&I Groups**

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- [SharePoint User Group](#)
- [Tableau User Group](#)


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Step 3) On the Tableau Server home page, click the “EPR Supervisors” link

Homepage | About Tableau Permissions | Learn More | Exporting Your Work | Get Underlying Data

New Here? Go to the Learn More tab to learn more about Tableau Server

helping people see and understand data


**Click to Explore All Reports:**

Workbooks

Projects

Views

<ul style="list-style-type: none"> <li><a href="#">Appeals Bridge</a></li> <li><a href="#">Appeals Dashboard</a></li> <li><a href="#">Appeals Monthly Reports</a></li> <li><a href="#">ASPEN Quality</a></li> <li><a href="#">BASE Detail WMT</a></li> <li><a href="#">BASE by District</a></li> <li><a href="#">BDD/QS Dashboard</a></li> <li><a href="#">Completed Clms &amp; Rated Issues</a></li> <li><a href="#">Dependency Details w/RBPS</a></li> <li><a href="#">Dimension Tables</a></li> <li><a href="#">Director's Performance DB (FY17)</a></li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Education Reports</a></li> <li><a href="#">Employee EPR Dashboard</a></li> <li><a href="#">EPIC Dashboard</a></li> <li><a href="#">EPR Supervisors</a></li> <li><a href="#">ETR Dashboard</a></li> <li><a href="#">EVSS Dashboard</a></li> <li><a href="#">FDC Receipts</a></li> <li><a href="#">Foreign Claims</a></li> <li><a href="#">FTE Dashboard</a></li> <li><a href="#">HVCC Homeless Report</a></li> <li><a href="#">Intent to File</a></li> <li><a href="#">Locked Ratings</a></li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Message Work Items</a></li> <li><a href="#">MAPD VBMS Development</a></li> <li><a href="#">MPA Contact List</a></li> <li><a href="#">NWQ Transfers</a></li> <li><a href="#">Omaha</a></li> <li><a href="#">Pension &amp; Fiduciary</a></li> <li><a href="#">Production Summary</a></li> <li><a href="#">RBPS Dashboard</a></li> <li><a href="#">RBPS Exceptions</a></li> <li><a href="#">Rating Claims by Geography</a></li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Recurring Adhocs</a></li> <li><a href="#">RMC-FARC Folder Retirement</a></li> <li><a href="#">Rollover Dashboard</a></li> <li><a href="#">Time and Transactions (TNT)</a></li> <li><a href="#">TMS Learning History</a></li> <li><a href="#">Transaction Summary</a></li> <li><a href="#">Transaction Summary Details</a></li> <li><a href="#">VBMS Deferrals</a></li> <li><a href="#">VBMS Do Not Recall</a></li> <li><a href="#">VHA/SHA Data</a></li> <li><a href="#">VSR EPR (See Employee EPR)</a></li> </ul> <p style="text-align: center;"><a href="#">Search Tableau Server</a></p>
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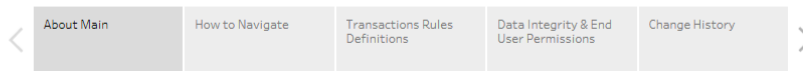
## NAVIGATING THE APPLICATION

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Upon entering the Supervisory EPR, a user sees the “About” page which outlines the report purpose, data refresh schedule and permissions. A user can click on the “How to Navigate”, “Transactions Rules Definitions”, “Data Integrity & End User Permissions”, or “Change History” boxes to learn more about the EPR Dashboard functionality, the rules that determine whether a transaction is creditable under the VSR and RVSR Performance Standards, and steps for troubleshooting and reporting data integrity issues.

▼ < | About the SUPV EPR | Supv EPR Summary | Supv TX Rollup | Supv TX Rollup - by Std Level | Supv Rollup by Range | VSR Team Summary | Supv Transaction Trends | Supv ASPEN Hours

### Supervisor Version: Employee Performance Report



#### THIS IS THE SUPERVISORS VERSION

##### **About This Workbook**

The purpose of the Supervisor's version of Employee Performance Report is to provide the Supervisor with the up-to-date and accurate information regarding their transactional, quality, training, and deferral data in one easy to reference location for individuals under their leadership.

The Employee Performance Report is maintained by the Office of Performance Analysis & Integrity's (PA&I) Business Intelligence (BI) Team in accordance with the established standards.

##### **Data Availability**

TMS Training and Deferral data represent activity since October 1, 2016 forward. Quality, Transaction, and Performance data are available as of March 1, 2017.

With the exception of WIT, data is updated on a daily basis at 6:30 AM EST. WIT data is updated weekly.

##### **Permissions**

This report is restricted to supervisors - this includes the Active Directory Groups for Directors, Managers, and Coaches. The report and its supporting data sources cannot be downloaded and must be accessed via Tableau Server.

The user must also be in the proper Active Directory group to access the report - more information on how to get added to one of the AD groups is available here: [https://vaww.portal2.va.gov/sites/pai/TSCM/Tableau\\_Server/SitePages/Home.aspx](https://vaww.portal2.va.gov/sites/pai/TSCM/Tableau_Server/SitePages/Home.aspx)

##### **WIT/EPR Fact Sheet**

For information about update teams, work-types and WIT information update frequency, please reference the WIT/EPR fact sheet maintained by OFO: [http://vbaw.vba.va.gov/bl/20/opai/PA/documents/WIT\\_EPR\\_FactSheet.PDF](http://vbaw.vba.va.gov/bl/20/opai/PA/documents/WIT_EPR_FactSheet.PDF)

## Supv EPR Summary

The “Supv EPR Summary” worksheet is a compilation of production, quality, training, and deferral performance statistics for RVSR employees. A user must first select their station in the section labeled ‘1. Select Station’. Next, the user should select employees from the ‘2. Select Employee’ list. Once a list of employees is generated, a user can toggle between the employees in the box labeled ‘3. Select User Login’.

A user can modify the time-range of performance statistics by sliding the date filter in the top right corner or clicking on one of the date fields and selecting a date from the pop-up calendar. Additionally, users can aggregate performance and deferral statistics by day, pay-period, month, or fiscal year in the “Transactional Performance Data” data table. Users can see additional performance details on the *Supv Tx Rollup*, *Supv Tx Rollup - by Std Level*, *VSR Team Summary*, *Supv Transaction Trends*, *Supv ASPEN Hours*, *Supv Training Completions*, *Supv Deferrals*, and the *Supv Quality* worksheets. A video tutorial of this report is available on the *Video Walk-Through* worksheet.

Please note: The data in *Supv Quality* worksheet is dependent on the timeliness of quality reviews. Therefore, it may take time before a Coach sees quality data for an RVSR. PA&I is still collecting the “Due Date” field for the *Supv Training Completions* worksheet.

The screenshot displays the 'Supv EPR Summary' report interface. At the top, there is a navigation bar with tabs for 'About the SUPV EPR', 'Supv EPR Summary', 'Supv Transaction Trends', 'Supv ASPEN Hours', 'Supv Training Completions', 'Supv Deferrals', 'Supv Quality', and 'Video Walk-Through'. Below the navigation bar, the report title 'Employee Performance Report' is shown. The main content area is divided into several sections:

- 1. Select Station:** A dropdown menu with '101' selected.
- 2. Select Employee:** A dropdown menu with '(None)' selected.
- 3. Select User Login:** A dropdown menu.
- Filter Dates:** A date range selector showing '10/1/2016' to '12/31/2017'.
- SUPERVISOR VERSION:** A red bar with the text 'SUPERVISOR VERSION'.
- Transactional Performance Data:** A section with a description: 'Hours worked to number of transactions completed and standard. Standard is pro-rated to available hours based on 80 performance standard.' Below this is a dropdown menu labeled 'Show Performance and Deferrals By' with 'Day' selected. To the right are three colored boxes: 'Excels' (green), 'Meets' (grey), and 'Under' (red).
- Performance Standard as of None:** A section with four metrics: 'Claim Quality', 'Number TMS Courses Completed for Period', 'Number of Reviews', and 'Deferrals for Period Selected'.
- Overview Countable Transactions:** A section with the text 'None'.
- ASPEN Hours Summary:** A section with the text 'None'.
- Work Credit:** A section with the text 'Work Credit'.

Red arrows in the image point to the '1. Select Station' dropdown, the '2. Select Employee' dropdown, the '3. Select User Login' dropdown, the 'Filter Dates' date range, the 'Show Performance and Deferrals By' dropdown, and the 'SUPERVISOR VERSION' bar.

## FREQUENTLY ASKED QUESTIONS

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The Supervisory EPR provides an overview of individual VSR and RVSR transactional, quality, training, and deferral performance statistics in one easy to reference location.

1. Who should I contact if I'm having trouble accessing Supervisory EPR?
  - a. Please contact your supervisor and s/he will work with local IT to ensure proper permissions have been established.
  
2. Do I need to have Tableau Reader or Tableau Desktop to view Supervisory EPR?
  - a. Supervisory EPR is restricted to web-browsing only and does not require Tableau Reader or Tableau Desktop
  
3. What data sources are used in Supervisory EPR?
  - a. EPR is comprised of datasets from ASPEN, Corporate Data Warehouse, VBMS, and TMS. The time-keeping data in EPR originates from ASPEN – not VATAS.
  
4. What should I do if I identify an issue with the data?
  - a. If you find any issues within the data or one of your employees reports concerns, please review the following:
    - 1) Check source systems to look for any discrepancies. For example, if the user is reporting an issue with their available hours, please check ASPEN to see if the data in this report matches what is shown in ASPEN.
  
    - 2) If you have verified that there is an issue with the data, please forward your concern via email to the CATS Mailbox for investigation. The email address is: <mailto:PACATSTEAM.VBAVACO@va.gov>