

October 2021 Fiduciary EPR Release

Performance Analysis and Integrity will be releasing several updates to the Employee Performance Report (EPR) and Supervisor Employee Performance Report (SEPR) based on the new Fiduciary Performance Standards. The updated views will be deployed on October 1, 2021 and accessible on the morning of October 2, 2021.

Please see the screenshots of the views in EPR. SEPR screenshots will be provided in a separate document.

About EPR

Employee Performance Report

The screenshot shows a navigation bar with tabs: 'When Was the Data Updated?', 'About Main', 'EPR News!', 'How to Navigate', 'Work Credit and Quality Threshold Lookup Table', 'Data Integrity & End User Permissions', and 'Work Credit'. The 'Work Credit and Quality Threshold Lookup Table' tab is selected.

Below the navigation bar, there is a link: [Click here for the Production Estimator!](#)

Production & Quality Reference Tables
For determining the weighted value of a work credit and the quality threshold dependant on number of tasks reviewed

Filters:
Position: FSR (dropdown)
Grade or Experience: (All) (dropdown)
Select Transaction: Return Field Exam (dropdown)
Contentions/Issues: 1 (input field)

Weighted Work Credit Values for 1 contentions/issues. Claim Label trumps EP

EP or Claim Label	Position	Tier	Return Field Exam
ALL EPS/CLM_LBLS	FSR	N/A	0.280

Quality Thresholds for FSR, GS 10

Select # of Tasks: (All) (dropdown)

The About Page provides information related to the workbook. It also includes the Work Credits and Quality Threshold Lookup Table tab. This will allow you to view the weighted value of a work credit. You can filter by Position, Grade or Experience, Transaction, and number of Contentions. Please note the lower chart will show the quality threshold dependent on the number of tasks reviewed. This quality lookup section does not apply to Fiduciary employees as it is only relevant to those on a quality threshold standard.

My EPR Summary

Employee Performance Report

QMS Data Alert for EPR: In isolated cases where an error pending in QMS has been overturned, EPR has not yet received the latest information from QMS.

Start Date: 10/1/2020 End Date: 9/30/2021


Name	Emp Station	Position	Grade	Team Name	FS Output	Excep. Output	Tasks Reviewed	Exceed Quality	Meets Quality
George Washington	101	FSR	11	Fiduciary Hubs Team	47	84	27	98.0%	96.0%

Transactional Performance Data							
Hours worked to number of transactions completed against standard. Standard is prorated to available hours based on 80 hours.							
Show Performance By		Select Work Type					
Day		View without Work Type					
Date	Production Result	Hours Worked	Claims	Work Credits Not on Standards	Work Credit on Standards	Fully Sat Standard (Pro-Rated)	Exceptional Standard (Pro-Rated)
9/9/21	Under	5.50	9.00	0.00	2.81	3.230	5.780
9/8/21	Meets	6.50	14.00	0.00	5.78	3.820	6.830
9/7/21	Excels	3.50	17.00	0.00	4.38	2.060	3.680
9/3/21	No Hours and/o...	0.00	0.00	0.00	0.00	0.000	0.000
9/2/21	Meets	8.50	19.00	0.00	6.16	4.990	8.930
9/1/21	Under	7.00	20.00	0.00	3.44	4.110	7.350
8/31/21	Under	10.00	0.00	0.00	0.00	5.880	10.500
8/30/21	Meets	10.00	15.00	0.00	6.06	5.880	10.500
8/27/21	No Hours and/o...	0.00	0.00	0.00	0.00	0.000	0.000
8/26/21	Under	10.00	25.00	0.00	4.17	5.880	10.500
8/25/21	Meets	10.00	16.00	0.00	5.91	5.880	10.500
8/24/21	Meets	10.00	19.00	0.00	6.41	5.880	10.500
8/23/21	Excels	10.00	27.00	0.00	10.56	5.880	10.500
8/20/21	No Hours and/o...	0.00	0.00	0.00	0.00	0.000	0.000
8/19/21	Under	10.00	16.00	0.00	5.05	5.880	10.500
8/18/21	Meets	10.00	26.00	0.00	6.22	5.880	10.500

Total Work Credits	287.830	Availability Rate	95.1%
Quality Score	81.5%	Completed Trainings	13
On Performance Standard	6	Deferrals	Caused By Def. Rate: 0.0%
Quality Reviews			Created By Def. Rate: 0.0%

- The employee bar at the top of the view appears on all pages and will display the information based on the User ID. The current standard will show, and the values will change according to the date range selected.
- The box on the left shows the current performance standard for production based on an 80-hour work period. You can change the “Show Performance By” parameter to choose how the view is aggregated.
- The color coding on this view will show the following:
 - Excelling the standard -> Green
 - Meeting the standard -> Blue
 - Below the standard -> Red
- The score card on the right shows the employee’s work credits, quality score, availability rate, and completed trainings. Fiduciary employees should disregard the deferrals scorecard as that is not a part of their performance standard.
- The icon indicates that you can click the value to view additional information on a different tab in the workbook. For example, when you want to view additional information regarding Total Work Credits, you can click on the value and you will be brought to the Transaction Trends view.

My Transaction Trends

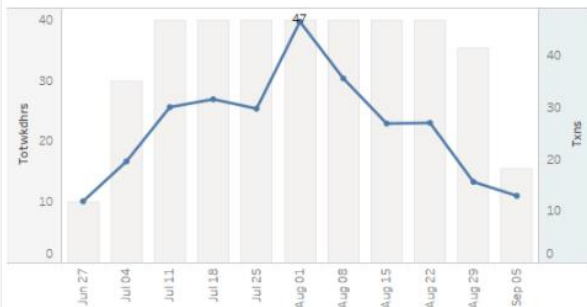
Click the value under  **Total Work Credits** on the EPR Summary view to activate the Transaction Trends view

Transaction Details & Trends

Start Date: 10/1/2020 End Date: 9/30/2021

Monthly Employee Deferral Trend: None

Transaction Trends by Week: George Washington




Transactions & Work Credits: George Washington

shown in employee timezone

Adj Zone Dt	Claim ID	File	EP	Transaction Type	Work Type	Nbr of Issues	Countable Transactions	Work Credit
9/8/2021 11:41:05 AM	99	1776	591	Interview Development (Closed)	All	Null	0	0.00
9/8/2021 11:39:43 AM	99	1776	591	Interview Development (Open)	All	Null	0	0.00
9/8/2021 10:43:25 AM	99	1776	591	Authorized	All	Null	1	0.50
9/8/2021 8:22:26 AM	99	1776	591	Workflow Activity Field Exam Assigned	All	Null	1	0.66
9/8/2021 8:22:23 AM	99	1776	591	Claim Establishment	All	Null	1	0.28
9/8/2021 8:22:07 AM	99	1776	590	Authorized	All	Null	1	0.50
9/8/2021 8:10:48 AM	99	1776	590	Ready for Decision	All	Null	1	0.28
9/8/2021 7:52:13 AM	99	1776	590	Award	All	Null	1	0.75
9/8/2021 7:50:26 AM	99	1776	590	Rating Decision Complete	All	Null	1	0.75
9/8/2021 7:41:53 AM	99	1776	590	Ready for Decision	All	Null	1	0.28
9/8/2021 6:45:05 AM	99	1776	590	Award	All	Null	1	0.75
9/8/2021 6:42:53 AM	99	1776	590	Rating Decision Complete	All	Null	1	0.75
9/8/2021 6:31:29 AM	99	1776	590	Ready for Decision	All	Null	1	0.28
9/7/2021 12:32:55 PM	99	1776	591	Workflow Activity Returned Field Exam	All	Null	1	0.28
9/7/2021 12:09:11 PM	99	1776	591	Authorized	All	Null	1	0.50
9/7/2021 9:52:26 AM	99	1776	591	Workflow Activity Returned Field Exam	All	Null	1	0.28
9/7/2021 9:47:57 AM	99	1776	591	Interview Development (Closed)	All	Null	0	0.00

- Fiduciary employees should disregard the top left chart showing the employee’s monthly deferral trends. Deferrals are not a part of the Fiduciary employee standard.
- The top right chart will show the employee’s weekly transaction trends.
- The detail chart on the bottom of the view will provide the detail data for Transactions & Work Credits.

Time & Leave Hours

Click the value under  **Availability Rate** on the EPR Summary view to activate the My Time & Leave Hours

Employee Hours Details by Day

This table shows your hours reported in ASPEN and WATRS in each respective category.

Date Level: Day | Start Date: 10/1/2020 | End Date: 9/30/2021

Hours Reported: George Washington

Date	Approved	Availability Rate	Hours Worked	Regular	Overtime	Excluded	Leave	Annual Leave Hrs	Sick Leave Hrs	Comp/Credit Hrs Taken	LWOP Hrs	Military Leave	Adr Le
09/09/2021		55.0%	5.50	10.00	0.00	4.50	0.00	0.0	0.0	0.0	0.0	0.0	0.0
09/08/2021		65.0%	6.50	10.00	0.00	3.50	0.00	0.0	0.0	0.0	0.0	0.0	0.0
09/07/2021		35.0%	3.50	10.00	0.00	6.50	0.00	0.0	0.0	0.0	0.0	0.0	0.0
09/03/2021	Null		0.00										
09/02/2021		85.0%	8.50	10.00	0.00	1.50	0.00	0.0	0.0	0.0	0.0	0.0	0.0
09/01/2021		70.0%	7.00	10.00	0.00	3.00	0.00	0.0	0.0	0.0	0.0	0.0	0.0
08/31/2021	Yes	100.0%	10.00	10.00	0.00	0.00	0.00	0.0	0.0	0.0	0.0	0.0	0.0
08/30/2021	Yes	100.0%	10.00	10.00	0.00	0.00	0.00	0.0	0.0	0.0	0.0	0.0	0.0
08/27/2021	Null		0.00										
08/26/2021	Yes	100.0%	10.00	10.00	0.00	0.00	0.00	0.0	0.0	0.0	0.0	0.0	0.0
08/25/2021	Yes	100.0%	10.00	10.00	0.00	0.00	0.00	0.0	0.0	0.0	0.0	0.0	0.0
08/24/2021	Yes	100.0%	10.00	10.00	0.00	0.00	0.00	0.0	0.0	0.0	0.0	0.0	0.0
08/23/2021	Yes	100.0%	10.00	10.00	0.00	0.00	0.00	0.0	0.0	0.0	0.0	0.0	0.0
08/20/2021	Null		0.00										
08/19/2021	Yes	100.0%	10.00	10.00	0.00	0.00	0.00	0.0	0.0	0.0	0.0	0.0	0.0
08/18/2021	Yes	100.0%	10.00	10.00	0.00	0.00	0.00	0.0	0.0	0.0	0.0	0.0	0.0
08/17/2021	Yes	100.0%	10.00	10.00	0.00	0.00	0.00	0.0	0.0	0.0	0.0	0.0	0.0
08/16/2021	Yes	100.0%	10.00	10.00	0.00	0.00	0.00	0.0	0.0	0.0	0.0	0.0	0.0
08/13/2021	Null		0.00										
08/12/2021	Yes	100.0%	10.00	10.00	0.00	0.00	0.00	0.0	0.0	0.0	0.0	0.0	0.0

- This view will show the leave and hours for the selected employee.
- You can scroll to the right to see additional leave and excluded time categories.

My Training Completions

Click the value under  **Completed Trainings** on the EPR Summary view to activate the My Training Completions


Training Completions

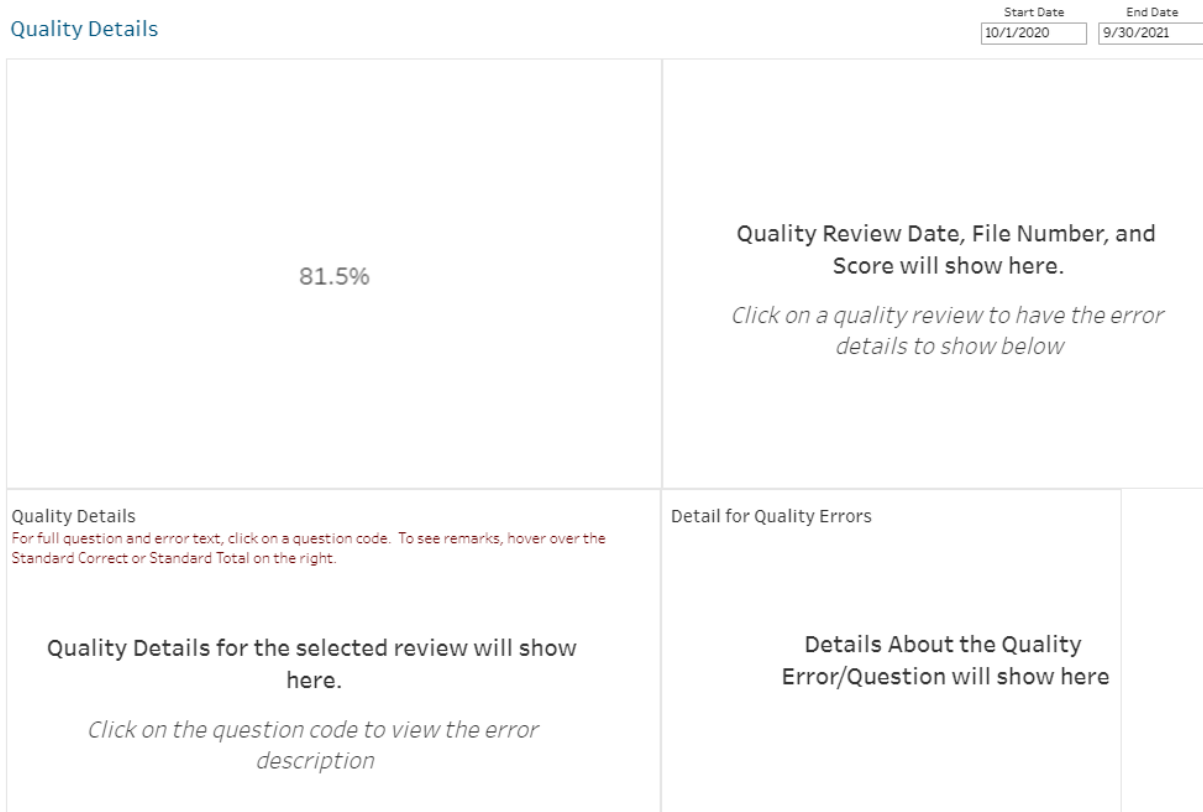
Start Date	End Date
10/1/2020	9/30/2021

Completed Training: George Washington	
Compl Da.	Course Title
09/01/2021	VBA Continuity of Operations Awareness
08/24/2021	COVID-19 Vaccination Information and Attestation
07/14/2021	Government Ethics - The Essentials VA Privacy and Information Security Awareness and Rules of Behavior VBA Active Threat Response (ATR) Training
04/14/2021	Prevention of Workplace Harassment/No FEAR
01/08/2021	S.A.V.E Training for Employees _Enduring
01/05/2021	The EEO, D&I, No FEAR, and Whistleblower Rights and Protection Policy Statement VA Core Values Training (I CARE Recommitment)
11/18/2020	Department of Veterans Affairs Emergency Alerting and Accountability System (EAAS)
11/13/2020	TMS 2.0 Upgrade Training (H1 2021)
11/05/2020	Records Management for All VBA Employees
10/23/2020	Teams Best Practices hosted by Microsoft

- This view will show the employee's completed trainings from TMS.

My Quality

Click the value under  **Quality Score** on the EPR Summary view to activate the My Quality view



- This view will show the employee's quality score and provide information on the quality reviews for the employee.
- The top left chart shows the employee's quality score.
- The top right chart will show the employee's quality reviews based on date, file number, action taken, and the quality score.
- The bottom two charts show the quality details and the detail for quality errors.