

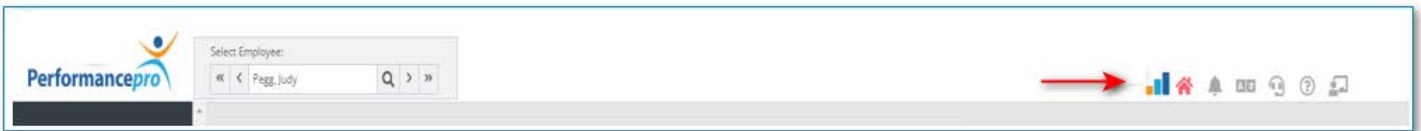


Performance Pro/Compease Post Integration 2024

Performance Pro/Compease Integration

Toggle Between Applications

Select the icon in the top right corner to toggle between the 2 applications. If the user does not have access to the application, they will not see the icon.



Shared Fields

- 12 Shared Fields: These fields are updated simultaneously when the field is updated in either application.

Username	Division/Branch
Employee ID	Department
First Name	Location
Last Name	Email
Middle Name	License Count
Hire Date	Termination Date
Appraiser	

- Fields that are program specific. They can only be updated from the application listed.

<u>Compease</u>	<u>Performance Pro</u>
- Location	- Is Appraiser
- Job Title	- Appraiser
- Salary Information	- Position

Compease Structured Compensation 3
Credit Union

Supervisor: JAMES, JAMES | Check in supervisor

Last Performance Rating: | Last Appraisal Period:

Job Information

Job Title*:

Department*: Marketing | Division/Branch*: Livonia, MI | Location*:

Hire Date*: 05/25/2022 | In Position*: | Last Increase*:

Salary Information

Pay Rate*: | Pay Basis*: | Pay Status*:

Frequency*: | Weekly Hours*: | Last Increase Amount:

Incentive: | Bonus:

Performancepro Home, Notifications, Settings, Help, Profile

Select Employee: Nelson, Christy

Manage Employees Employee Data

Settings | Salary | Terminated | Change Log

Employee Info

* First Name: Christy | * Last Name: Nelson | Middle Name:

Hire Date: | Termination Date:

Appraiser 1: Adams, James | Position: Administrative Assistant - Administration

Appraiser 2: None

User Setup

Appraisal Settings

Privileges

Is Appraiser | Is MA | Advance Analytics Access: Administrator Access

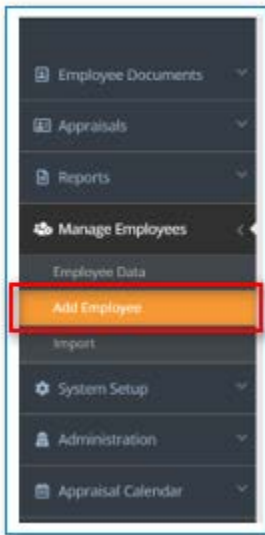
View Salary Data | Sync to TLC

Downline View

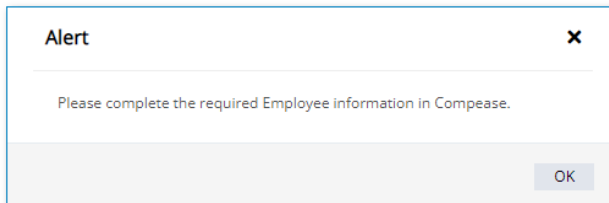
Adjust Merit Pay

Adding New Employees

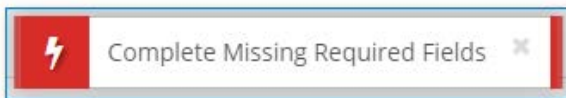
- Add new employees in Performance Pro.



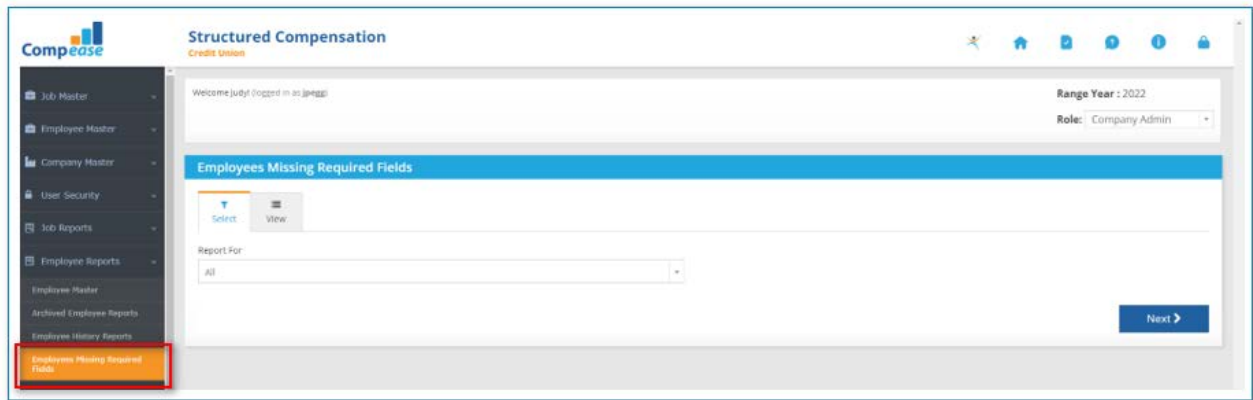
- Once an employee is added you will receive a pop-up message that states the following: “Please complete the required Employee Information in Compease.” In Compease you will need to complete the Job Information and Salary Information.



- In Compease, you will receive a message to “Complete Missing Required fields” for the new employee when selected in Employee Master.



- The “Employee Missing Required Fields” report will show all the required Compease fields that will need to be completed in Compease once you add a new employee into Performance Pro.



Compease Structured Compensation
Credit Union

Welcome Judy! (logged in as jpegg)

Employees Missing Required Fields

Select View Export

Print

Credit Union
Employees Missing Required Fields

Data Year: 2022
Prepared On: 03/25/2022

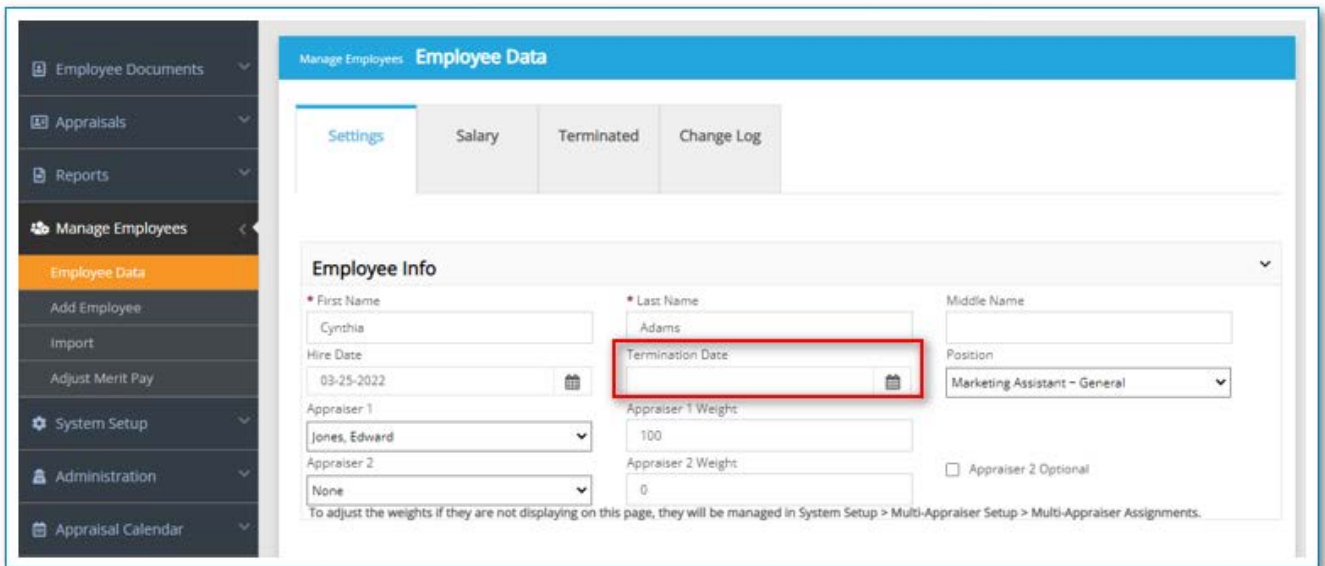
Employee ID	Employee Name	Missing Required Fields
30450	Adams, Cynthia	Job Title, Location, In Position, Last Increase, Pay Rate, Frequency, Pay Status, Pay Basis, Weekly Hours
300215	Johnson, David	Job Title, Location, In Position, Pay Rate, Frequency, Pay Status, Pay Basis, Weekly Hours
3000	Princess, Jasmin	Frequency, Pay Status, Pay Basis
1202354	Smith, Becky	Job Title, Location, Hire Date, In Position, Last Increase, Pay Rate, Frequency, Pay Status, Pay Basis, Weekly Hours

LOADING...

- **Please Note:** Compease Merit Planning cannot be fully utilized if there is missing required information for any employee.

Terminating Employees

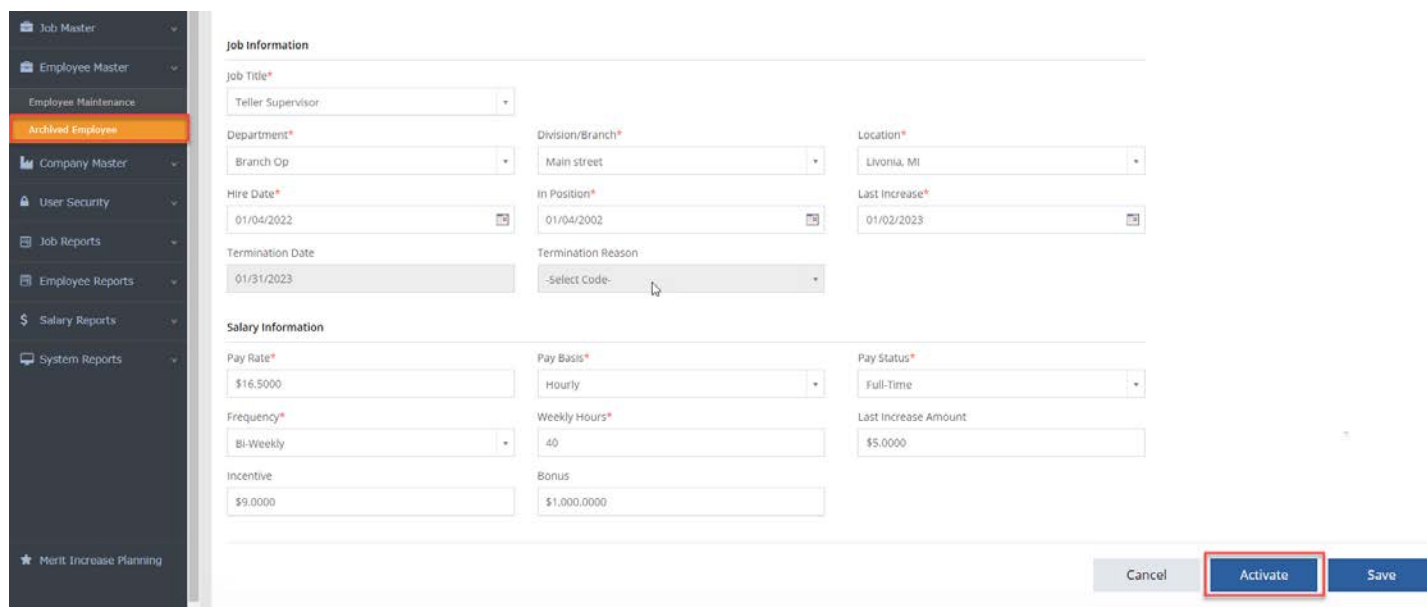
- Terminating employees is done in Performance Pro.



The screenshot shows the 'Employee Data' form in Performance Pro. The 'Employee Info' section contains the following fields:

* First Name	Cynthia	* Last Name	Adams	Middle Name	
Hire Date	03-25-2022	Termination Date		Position	Marketing Assistant - General
Appraiser 1	Jones, Edward	Appraiser 1 Weight	100	Appraiser 2 Optional	<input type="checkbox"/>
Appraiser 2	None	Appraiser 2 Weight	0	To adjust the weights if they are not displaying on this page, they will be managed in System Setup > Multi-Appraiser Setup > Multi-Appraiser Assignments.	

- Reinstate employees in the Compease application.



The screenshot shows the 'Archived Employee' form in the Compease application. The form is divided into 'Job Information' and 'Salary Information' sections.

Job Information:

Job Title*	Teller Supervisor		
Department*	Division/Branch*	Location*	
Branch Op	Main street	Livonia, MI	
Hire Date*	In Position*	Last Increase*	
01/04/2022	01/04/2002	01/02/2023	
Termination Date	Termination Reason		
01/31/2023	-Select Code-		

Salary Information:

Pay Rate*	Pay Basis*	Pay Status*
\$16,5000	Hourly	Full-Time
Frequency*	Weekly Hours*	Last Increase Amount
Bi-Weekly	40	\$5,0000
Incentive	Bonus	
\$9,0000	\$1,000,0000	

At the bottom right, there are three buttons: 'Cancel', 'Activate' (highlighted in red), and 'Save'.

Job Title vs. Position

- The **Job Title** in Compease is driving your Grade/Salary Range. The **Position** in Performance Pro is driving your Appraisal; therefore, these **fields are not connected** and will need to be updated in each application.

The screenshot shows the 'Employee Master' form in Compease. The left sidebar contains navigation options: Employee Master, Employee Maintenance (highlighted), Archived Employee, Company Master, User Security, Job Reports, Employee Reports, Salary Reports, and System Reports. The main form area is divided into 'Job Information' and 'Salary Information' sections. In the 'Job Information' section, the 'Job Title*' field is highlighted with a red box. Other fields include Department* (Marketing), Division/Branch* (Livonia, MI), Location*, Hire Date* (03/25/2022), In Position*, and Last Increase*. The 'Salary Information' section includes Pay Rate*, Pay Basis*, Pay Status*, Frequency*, Weekly Hours*, Last Increase Amount, Incentive, and Bonus.

The screenshot shows the 'Employee Data' form in Performance Pro. The left sidebar contains navigation options: Employee Documents, Appraisals, Reports, Manage Employees (highlighted), Employee Data (highlighted), Add Employee, Import, Adjust Merit Pay, System Setup, Administration, and Appraisal Calendar. The main form area is titled 'Employee Data' and has tabs for Settings, Salary, Terminated, and Change Log. The 'Employee Info' section contains fields for First Name (Cynthia), Last Name (Adams), Middle Name, Hire Date (03-25-2022), Termination Date, Appraiser 1 (Jones, Edward), Appraiser 1 Weight (100), Appraiser 2 (None), and Appraiser 2 Weight (0). The 'Position' field is highlighted with a red box and shows 'Marketing Assistant - General'. A checkbox for 'Appraiser 2 Optional' is also present. A note at the bottom states: 'To adjust the weights if they are not displaying on this page, they will be managed in System Setup > Multi-Appraiser Setup > Multi-Appraiser Assignments.'

Performance Levels

- Performance Level, Last Performance Rating and Last Appraisal Period will now update in Compease when the appraisal is marked “Completed” or “Share with Compease” is selected in Performance Pro. These fields **cannot** be altered in Compease once the integration takes place.

Performancepro Select Employee: << < Bush, Carol Q > >>

Appraisals **Finish Appraisal** View: Administrative User

Status Overview Ready Merge Route **Complete**

The Appraisal is ready to be completed.

Complete Share with Compease

Push the Share with Compease button if you'd like to update the employee's record with the current score. Once pushed, the score will automatically be updated if it changes or upon completion of the Appraisal.

Score Summary

SCORE SUMMARY	TOTAL	WEIGHT	SCORE	PERF. RATING
Competency	5.00	100%	5.00	5.00
Individual Goal	0	0%	0	High Performer

Overall Progress: 100%
Competency Progress: 100%
Individual Goal Progress: 0%

View Current Appraisal

Employee Appraisal Information

Position: Accounting Manager

Appraisal Period: 08-01-2021 — 07-31-2022

Appraisers: Frosty, Carolyn

Compease Structured Compensation Credit Union

Job Grade: 9 Pay Rate: \$24.5000 Compa Ratio: 88.9600%
Range Min: \$22.0300 Mid Point: \$27.5415 Range Max: \$33.0500

Employee Information

Employee ID*: 657 Username*: mharmon

First Name*: Mark Middle Initial: Last Name*: Harmon

Birth Date: 07/12/1994 Race/Ethnicity: Asian Gender: Male

Email: Custom Field: None

Supervisor: None Check if Supervisor

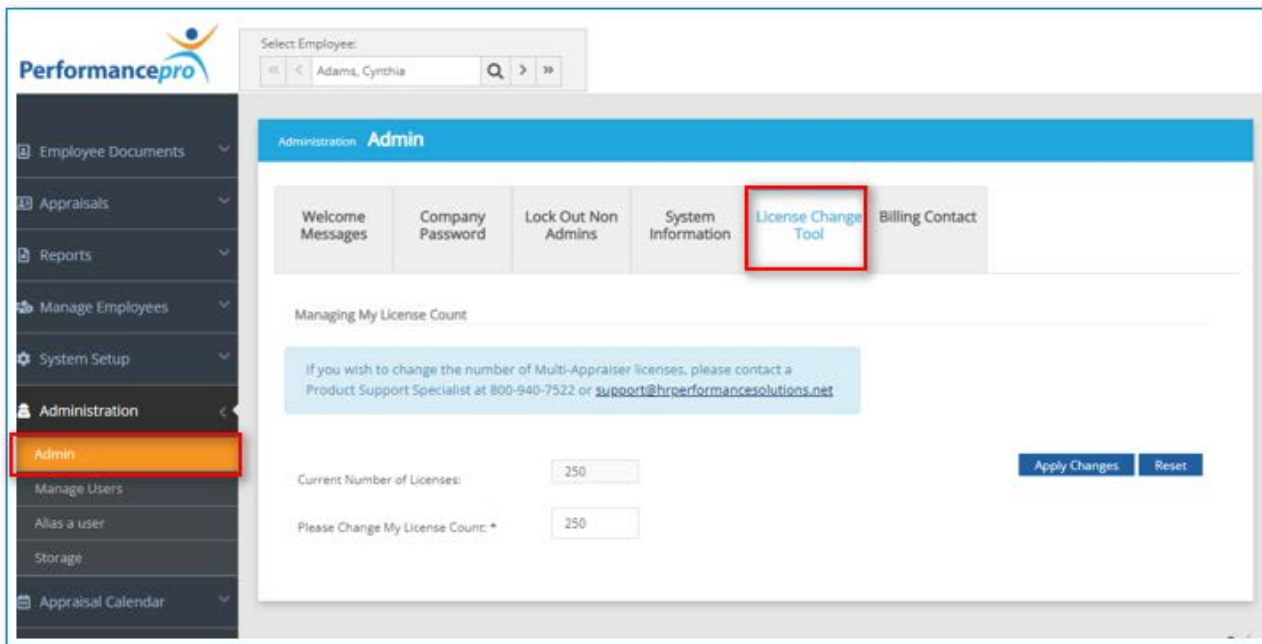
Performance Level: Valued Performer

Last Performance Rating: 4.00

Last Appraisal Period: 08/01/2021 to 07/31/2022

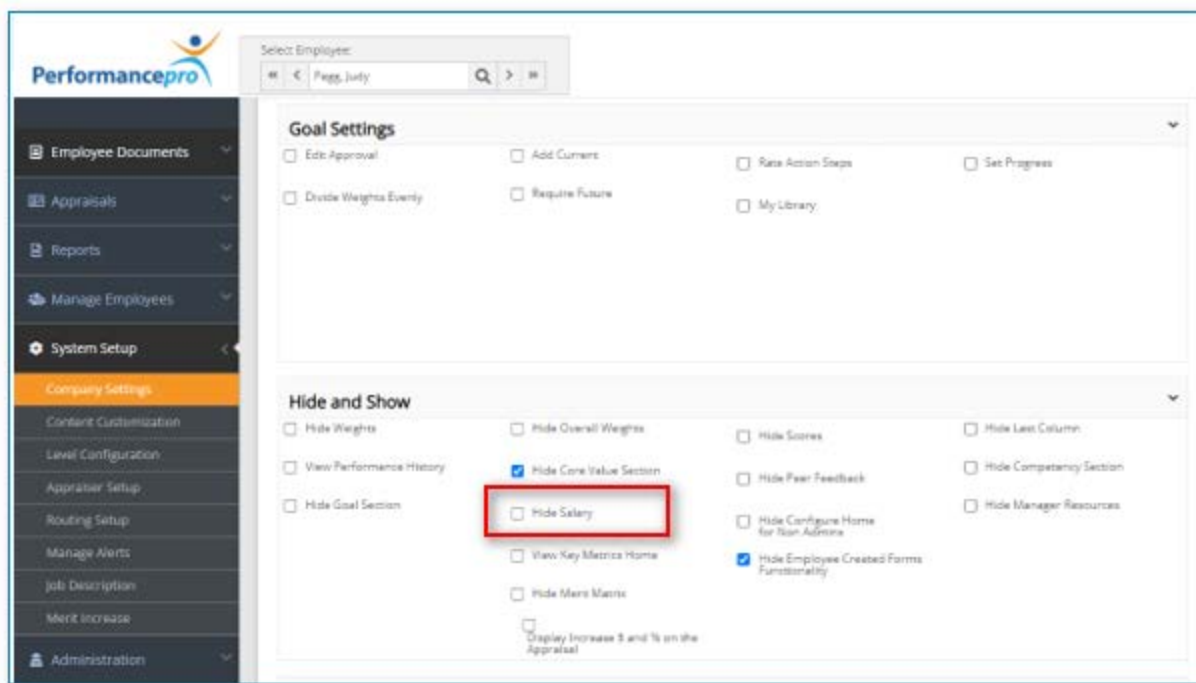
Adding Licenses

- New licenses are added in Performance Pro.



Salary Information

- Salary information from Compease will now be visible in Performance Pro on the Salary Tab unless hidden in Company Settings.



- Salary data from Compease will be visible but cannot be altered in Performance Pro.

Structured Compensation
Credit Union

Job Information

Job Title*: Teller Supervisor

Department*: Branch Op

Division/Branch*: Main street

Location*: Livonia, MI

Hire Date*: 01/04/2022

In Position*: 01/04/2002

Last Increase*: 01/04/2022

Salary Information

Pay Rate*: \$16,5000

Pay Basis*: Hourly

Pay Status*: Full Time

Frequency*: Bi-Weekly

Weekly Hours*: 40

Last Increase Amount

Incentive

Bonus

Performancepro

Select Employee: Adams, James

Manage Employees: **Employee Data**

Settings | **Salary** | Terminated | Change Log

Salary

Status: Full Time

Pay Basis: Hourly

Pay Frequency: Bi-Weekly

Pay Rate: 16,5000

Change Amount: 0.00

Weekly Hours: 40

Percentage

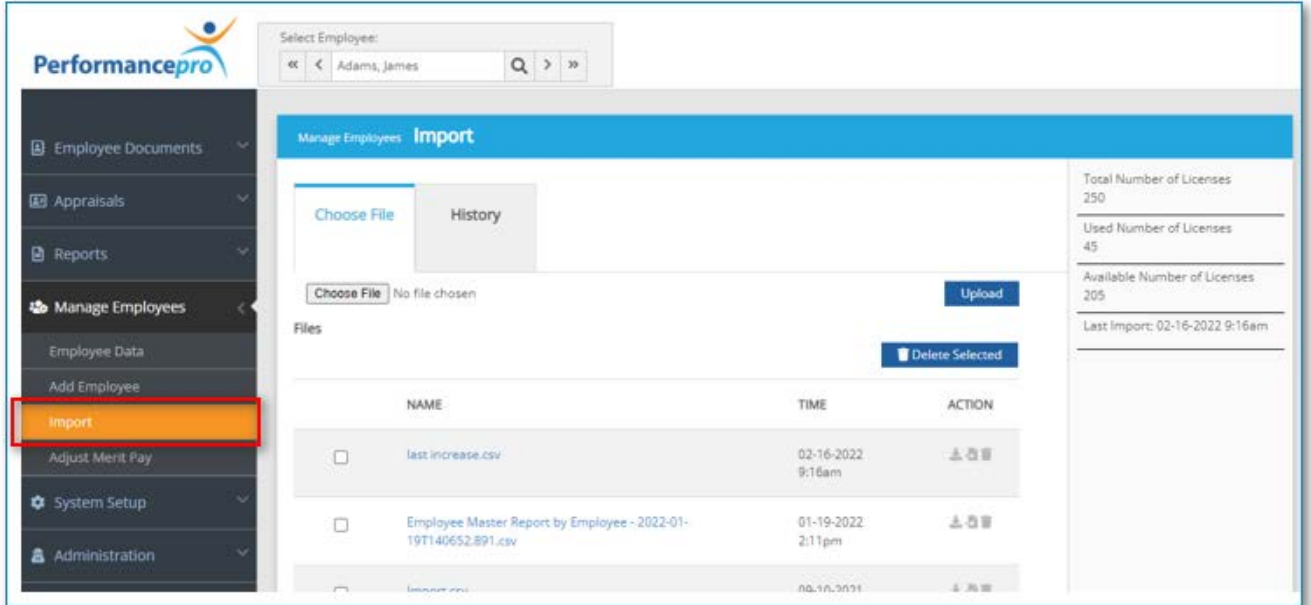
Last Change

Merit

Save

Importing Employee Data

- The import tool in Performance Pro will now be used to mass update information for both applications. The Data Bridge in Compease will no longer be available.



The screenshot displays the Performance Pro user interface for the 'Import' function. On the left, a navigation menu lists various system options, with 'Import' highlighted in orange. The main content area is titled 'Manage Employees Import' and includes a search bar for 'Adams, James'. Below the search bar, there are 'Choose File' and 'History' tabs. The 'Choose File' section shows 'No file chosen' and an 'Upload' button. A 'Files' section contains a table of imported files with columns for 'NAME', 'TIME', and 'ACTION'. The table lists two files: 'last increase.csv' and 'Employee Master Report by Employee - 2022-01-19T140652.891.csv'. On the right side, a summary panel displays license information: Total Number of Licenses (250), Used Number of Licenses (45), Available Number of Licenses (205), and Last Import: 02-16-2022 9:16am.

NAME	TIME	ACTION
<input type="checkbox"/> last increase.csv	02-16-2022 9:16am	
<input type="checkbox"/> Employee Master Report by Employee - 2022-01-19T140652.891.csv	01-19-2022 2:11pm	
<input type="checkbox"/> Import.csv	02-16-2022 9:16am	