

# ePerformance Resources

## Employee Evaluation Process Managers Job Aid

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Beginning July 1, 2010, employees and managers will begin the employee evaluation process using the e-Performance system (in Teamworks/employee self-service).

The employee, manager, and manager's manager all have an active role in the evaluation process.

This document includes the steps that managers and manager's managers should follow to complete and finalize the evaluation in the system.

## Manager: Steps to Complete the Employee Evaluation

1. You will receive an email from the e-Performance system (see example below) notifying you that the employee has completed their self-evaluation.

### MANAGER EMAIL

From: Employee Self Service Email [mailto:SAO\_PS\_email@sao.ga.gov]  
Sent: Wednesday, June 23, 2010 4:35 PM  
To: Angie Ledford  
Subject: Your employee Lisa Griffin has completed their self evaluation

Your employee Lisa Griffin has completed their self evaluation for Annual Performance Review :

[https://team.state.ga.us/psp/saopa/EMPLOYEE/EMPL/h/?tab=PAPP\\_GUEST](https://team.state.ga.us/psp/saopa/EMPLOYEE/EMPL/h/?tab=PAPP_GUEST)

2. Log in to Employee Self Service.

The screenshot shows a web browser window titled "Welcome To TeamWorks - Windows Internet Explorer provided by Ga Department of Public Safety". The address bar shows the URL: [https://team.state.ga.us/psp/saopa/EMPLOYEE/EMPL/h/?tab=PAPP\\_GUEST](https://team.state.ga.us/psp/saopa/EMPLOYEE/EMPL/h/?tab=PAPP_GUEST). The page content includes a navigation menu with "TEAM GEORGIA", "ESS/TEAMWORKS", "CUSTOMER SERVICE", and "FLEX-GABREEZE". The main content area features a "STATE EMPLOYEE SELF SERVICE LOGIN" section with input fields for "User ID:" and "Password:", and a "Sign In" button. Below this is an "IMPORTANT NOTICE" section and a "NEWS AND ANNOUNCEMENTS" section with several links.

### 3. Click on “Manager Self Service”

The screenshot shows the Team Georgia Connection website interface. The browser address bar displays the URL: <https://team.state.ga.us/psp/soapa/EMPLOYEE/EMPL/h/?tab=DEFAULT>. The page header includes the logo for TEAM GEORGIA CONNECTION and navigation tabs for TEAM GEORGIA, ESS/TEAMWORKS, CUSTOMER SERVICE, and FLEX-GABREEZE. The main content area features a 'TEAMWORKS MENU' on the left, which is expanded to show 'Manager Self Service' highlighted with a black arrow. Other menu items include My Help, Quick Links, Self Service, Workforce Administration, Benefits, Compensation, Payroll for North America, Global Payroll & Absence Mgmt, Workforce Development, and Organizational Development. The 'MANAGER SELF SERVICE' section is also visible, with a sub-link for 'View Employee Personal Info'.

### 4. Click on Performance Management

The screenshot shows the Base Navigation Page of the Team Georgia Connection website. The browser address bar displays the URL: [https://team.state.ga.us/psp/soapa/EMPLOYEE/EMPL/s/WEBLIB\\_PTTP\\_SC.HOMEPAGE.FieldFormula.IScript\\_AppHP](https://team.state.ga.us/psp/soapa/EMPLOYEE/EMPL/s/WEBLIB_PTTP_SC.HOMEPAGE.FieldFormula.IScript_AppHP). The page header includes the logo for TEAM GEORGIA CONNECTION and navigation tabs for TEAM GEORGIA, ESS/TEAMWORKS, CUSTOMER SERVICE, and FLEX-GABREEZE. The main content area features a 'MENU' on the left, which is expanded to show 'Performance Management' highlighted with a black arrow. The 'Performance Management' section is also visible, with a sub-link for 'Performance Documents' highlighted with a black box. Other menu items include My Help, Quick Links, Self Service, Manager Self Service, Time Management, Job and Personal Information, and Performance Management. The 'Performance Management' section includes links for Performance Documents, Approve Documents, View Approval Status, Approver Doc Status Report, Approver Review Rating Report, Manager Review Rating Report, Mass Approval, and Maintain Performance Notes.

### 5. Click on Performance Documents

The screenshot shows the Base Navigation Page of the Team Georgia Connection website. The browser address bar displays the URL: [https://team.state.ga.us/psp/soapa/EMPLOYEE/EMPL/s/WEBLIB\\_PTTP\\_SC.HOMEPAGE.FieldFormula.IScript\\_AppHP](https://team.state.ga.us/psp/soapa/EMPLOYEE/EMPL/s/WEBLIB_PTTP_SC.HOMEPAGE.FieldFormula.IScript_AppHP). The page header includes the logo for TEAM GEORGIA CONNECTION and navigation tabs for TEAM GEORGIA, ESS/TEAMWORKS, CUSTOMER SERVICE, and FLEX-GABREEZE. The main content area features a 'MENU' on the left, which is expanded to show 'Performance Documents' highlighted with a black arrow. The 'Performance Documents' section is also visible, with a sub-link for 'Performance Documents' highlighted with a black box. Other menu items include My Help, Quick Links, Self Service, Manager Self Service, Time Management, Job and Personal Information, and Performance Management. The 'Performance Documents' section includes links for Approve Documents, View Approval Status, Approver Doc Status Report, Approver Review Rating Report, Manager Review Rating Report, Mass Approval, and Maintain Performance Notes.

## 6. Click on Current Documents

The screenshot shows the TEAM GEORGIA CONNECTION website interface. The left-hand navigation menu is expanded to show 'Performance Management' and 'Performance Documents'. The 'Current Documents' link is highlighted with a red box. An arrow points from the text 'Click on Current Documents' to this link.

## 7. Click on Annual Performance Review for the employee that you are ready to evaluate.

The screenshot shows the 'Current Performance Documents' page. A table lists performance documents for the manager. The row for Lisa Griffin is highlighted with a red box, and an arrow points to the 'Annual Performance Review' link in the 'Document Type' column.

Employee	Mid Initial	Document Type	Begin Date	End Date	Job Title	Status
Jacqueline Thurman	V	Annual Performance Review	07/01/2009	06/30/2010	TS: HR Transactions Tech (AL)	In Progress
Lisa Griffin	W	Annual Performance Review	07/01/2009	06/30/2010	TS: HR Transactions Tech (AL)	In Progress

## 8. In the “Review Self-Evaluation” Step, click View to open and read the employee self-evaluation.

The screenshot shows the 'Document Details' page for Lisa Griffin's Annual Performance Review. A table shows the document progress with a red box highlighting the 'View' link in the 'Review Self Evaluation' row.

Step	Status	Due Date	View
Establish Evaluation Criteria	Completed	04/04/2010	View
Review Self Evaluation	Completed	07/31/2010	View
Complete Manager Evaluation	Not Started	05/25/2010	Start

## 9. Scroll down to read and review the ratings the employee rated themselves and the comments provided to support the ratings.

Thursday, June 24, 2010 10:39 AM Welcome Ledford,Angela M My Links Select One: Site Search Sign out

The document status is Completed.

Save Cancel Return to Document Detail

View Printable Evaluation Notify

**Section 1 - Statewide Core Competencies**

**Customer Service**

Details

Description: Understands that all employees have external and/or internal customers that they provide services and information to; honors all of the State's commitments to customers by providing helpful, courteous, accessible, responsive, and knowledgeable service.

- Critical: Yes

Comments

I believe that this is one of my strengths. This past year, I received 6 compliment letters from

## 10. If you would like to print the self evaluation, click on the [View Printable Evaluation](#) link.

Georgi CONNECTION TEAM GEORGIA ESS/TEAMWORKS CUSTOMER SERVICE FLEX-GABREEZE FASTER. FRIENDLIER. EASIER.

My Employee Self Service TeamWorks Homepage

Thursday, June 24, 2010 10:39 AM Welcome Ledford,Angela M My Links Select One: Site Search Sign out

The document status is Completed.

Save Cancel Return to Document Detail

View Printable Evaluation Notify

**Section 1 - Statewide Core Competencies**

**Customer Service**

Details

Description: Understands that all employees have external and/or internal customers that they provide services and information to; honors all of the State's commitments to customers by providing helpful, courteous, accessible, responsive, and knowledgeable service.

## 11. Right Click on your mouse to show the drop down menu. Scroll down and click on "Print".

Return to Evaluation

**Performance Document - Annual Performance Review**

**Employee Evaluation**

Lisa Griffin, TS: HR Transactions Tech (AL)  
Annual Performance Review: 07/01/2009 - 06/30/2010

Manager: Lisa Griffin Department: Personnel  
Status: Completed Due Date: 07/31/2010  
Approval: Not Submitted

Score the performance in each job fact

5 = Exceptional Performer - Employee exceeded performance expectations. Employee was an exceptional contributor to the success of his/her department behaviors.

4 = Successful Performer - Plus - Employee met performance expectations.

3 = Successful Performer - Employee met 50% of performance expectations. Employee met behavioral competencies.

2 = Successful Performer - Minus - Employee met some performance expectations. Employee met behavioral competencies.

1 = Unsatisfactory Performer - Employee did not meet performance expectations. Employee needs significant coaching and support to meet behavioral competencies.

N = Not Rated - At the agency's discretion period may or may not receive a performance rating.

**Section 1 - Statewide Core Competencies**

**1) Customer Service**

Description: Understands that all employees provide services and information to customers by providing helpful, courteous, accessible, responsive, and knowledgeable service.

Rating

4

Print...  
Print Preview...  
Export to Microsoft Excel

12. Click on [Return to Evaluation](#) at the top of the self-evaluation to return to the self-evaluation.

Thursday, June 24, 2010 10:39 AM Welcome Ledford, Angela M My Links Select One: Site Search Sign out

Performance Document - Annual Performance Review  
**Employee Evaluation**  
 Lisa Griffin, TS: HR Transactions Tech (AL)  
 Annual Performance Review: 07/01/2009 - 06/30/2010

Manager: Lisa Griffin Department: Personnel  
 Status: Completed Due Date: 07/31/2010  
 Approval: Not Submitted

Score the performance in each job factor below on a scale 1-4 or 5 as follows:

13. Click on [Return to Document Detail](#) at the top of the self-evaluation to return to the status screen.

Thursday, June 24, 2010 10:39 AM Welcome Ledford, Angela M My Links Select One: Site Search Sign out

Performance Document - Annual Performance Review  
**Self-Evaluation**  
 Lisa Griffin, TS: HR Transactions Tech (AL)  
 Annual Performance Review: 07/01/2009 - 06/30/2010

Author: Lisa Griffin Role: Employee  
 Status: Completed Due Date: 07/31/2010

The document status is Completed.

Save Cancel [Return to Document Detail](#)

[View Printable Evaluation](#)  [Notify](#)

Section 1 - Statewide Core Competencies

14. In the “Complete Manager Evaluation” step, click [Start](#) to open the evaluation.

My Employee Self Service TeamWorks Homepage

Sunday, June 27, 2010 3:03 PM Welcome Ledford, Angela M My Links Select One: Site Search Sign out

Performance Documents  
 Current Documents  
 Historical Documents  
 Approve Documents  
 View Approval Status  
 Approver Doc Status Report  
 Approver Review Rating Report  
 Manager Review Rating Report  
 Mass Approval  
 Maintain Performance Notes  
 Workforce Administration  
 Benefits  
 Compensation  
 Payroll for North America  
 Global Payroll & Absence Mgmt  
 Workforce Development  
 Organizational Development  
 Enterprise Learning  
 Workforce Monitoring

Current Performance Documents  
**Document Details**  
 Lisa Griffin, TS: HR Transactions Tech (AL)  
 Annual Performance Review: 07/01/2009 - 06/30/2010

Performance Document Details

Employee: Lisa Griffin Job Title: TS: HR Transactions Tech (AL)  
 Document Type: Annual Performance Review Period: 07/01/2009 - 06/30/2010  
 Manager: Angela Ledford Status: In Progress  
 Template Name: Annual Performance Review

Document Progress			
Step	Status	Due Date	
Establish Evaluation Criteria	Completed	01/01/2010	<a href="#">View</a>
Review Self Evaluation	Completed	07/31/2010	<a href="#">View</a>
Complete Manager Evaluation	Not Started	07/31/2010	<a href="#">Start</a>

**Save** – click this button to save your work. We suggest saving often, as the system will time out due to inactivity

**Submit for Approval** – Only click the Submit for Approval button when you are 100% finished with the evaluation and are ready for your manager to review and approve.

**15. Enter ratings and comments for section 1 (Statewide Core Competencies).** Again, be sure to save often – the system will time-out after a period of inactivity and you will lose any work that has not been saved.

You are able to see the rating the employee entered, but not the comments. In order to see the comments, you must view the self-evaluation from the status screen.

To enter the rating, click on the drop down menu and click on the selected rating.

Each competency, goal or job responsibility has a “comment” text box for you to include any comments that help support the rating you have selected.

Click on the icon (book with the check mark) to run spell check for each comment text box.

Click on the drop down to select a rating.

16. At the end of Section 1, click on the calculator icon to calculate the overall section rating for section 1.

Calculator icon next to Rating field in the Statewide Core Competencies Summary section.

Remember the rounding rules:

- 0.0 – 1.49 = 1 (unsatisfactory performer)
- 1.5 – 2.49 = 2 (satisfactory performer – minus)
- 2.5 – 3.49 = 3 (satisfactory performer)
- 3.5 – 4.49 = 4 (satisfactory performer – plus)
- 4.5 – 5.00 = 5 (exceptional performer)

The system averages the ratings for each competency in section 1 to give you an overall rating of 3.4 (in this example). Therefore, the overall rating for section 1 in this example is a 3 – Successful Performer.

The screenshot shows the 'Statewide Core Competencies Summary' section. A box highlights the overall rating: **Rating: 3-Successful Performer** with a score of **3.40**. The summary weight is 25%.

Rating	Score
3-Successful Performer	3.00
<b>Average Rating: 3-Successful Performer</b>	<b>3.00</b>
<b>Rating: 3-Successful Performer</b>	<b>3.40</b>

**17. Continue on to Section 2 (Individual Goals/Competencies). Select a rating for each goal or competency. At the end of section 2, click on the calculator icon to calculate the overall section rating for section 2.**

The screenshot shows the 'Individual Goals/Competencies Summary' section. A box highlights the overall rating: **Rating: 4-Successful Performer - Plus** with a score of **3.50**. The summary weight is 50%.

Rating	Score
3-Successful Performer	3.00
<b>Average Rating: 4-Successful Performer - Plus</b>	<b>4.00</b>
<b>Rating: 4-Successful Performer - Plus</b>	<b>3.50</b>

**18. Continue on to Section 3 (Job Responsibilities). Select a rating for each job responsibility. At the end of section three, click on the calculator icon to calculate the overall section rating for section three.**

The screenshot shows the 'Job Responsibilities Summary' section. A box highlights the overall rating: **Rating: 3-Successful Performer** with a score of **3.33**. The summary weight is 25%.

Rating	Score
3-Successful Performer	3.00
<b>Average Rating: 3-Successful Performer</b>	<b>3.00</b>
<b>Rating: 3-Successful Performer</b>	<b>3.33</b>

**19. In Section 6 – Overall Summary, click on the calculator icon to calculate the overall section rating for the evaluation.**

The screenshot shows the 'Section 6 - Overall Summary' page. A box highlights the 'Calculate Rating' button next to a rating of 3.43. Another box highlights the 'Calculate All Ratings' button at the bottom of the page. The page also shows a 'Comments' section and a 'Section 7 - Individual Development Plan' section.

The **Calculate All Ratings** button is another way to ensure that all sections/ratings are calculated for the final rating.

The system takes the overall rating for each section and the weight given to the section to calculate the overall rating that the employee receives.

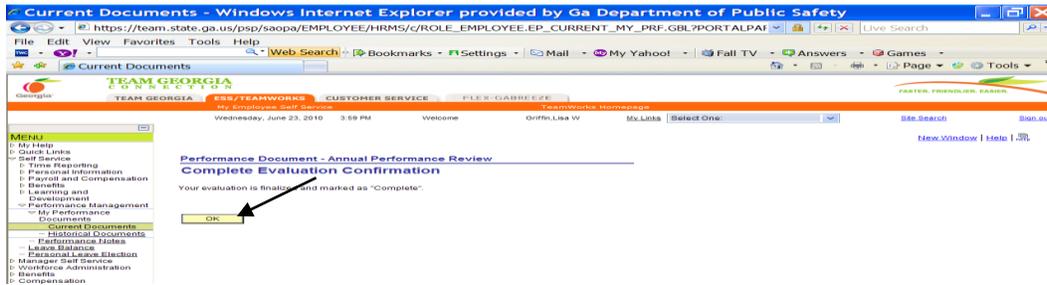
**20. When you have finished the evaluation, select the **Submit for Approval** button to make the document available to your manager (the manager's manager).**

The screenshot shows the 'Section 7 - Individual Development Plan' page. A box highlights the 'Submit for Approval' button. The page also shows a 'Calculate All Ratings' button and a 'Cancel Evaluation' button.

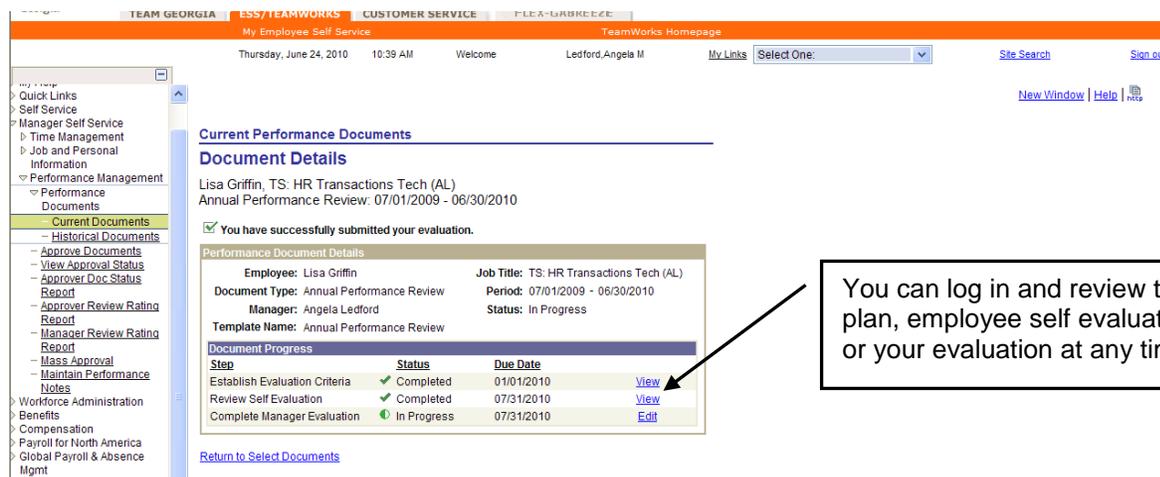
**21. To ensure that you did not click **Submit for Approval** by mistake, the system will ask you to click **Submit** one more time to finalize the evaluation.**

The screenshot shows the 'Performance Document - Annual Performance Review' page. The title is 'Submit for Approval'. The user is Lisa Griffin, TS: HR Transactions Tech (AL). The Annual Performance Review is for 07/01/2009 - 06/30/2010. The page contains instructions: 'You have chosen to submit this performance evaluation for approval. To confirm that you would like to submit the evaluation for approval, click the Submit button. Do not submit this evaluation until you have completed each section. Once you click Submit, the evaluation will be routed through the approval process to the appropriate individuals. You will then be notified through email on the approval status. The overall rating you have assigned to this document is 3-Successful Performer.' A box highlights the 'Submit' button.

## 22. Click the **OK** button



## 23. This completes the manager evaluation.



Your manager will now review the evaluation that you submitted and will either approve or deny the evaluation. If you have given the employee an overall rating of anything other than 3 (Successful Performer), your manager will be required to get approval through the chain before he/she can approve the evaluation.

**If you find that you need to edit the evaluation AFTER you have submitted for approval, you have two options:**

1. Ask your manager to deny the evaluation. This will allow you to go back in the evaluation and edit it.
2. Call HR and ask to have the evaluation re-set.

## Manager's Manager: Steps to Reviewing and Approving Evaluations

Steps 23 – 34 are only for Manager's Managers. If you are not a Manager's Manager, please proceed to step 35.

### 24. Log in to Employee Self Service.

### 25. Click on "Manager Self Service"

### 26. Click on Performance Management

27. Click on **Approve Documents**. Be patient – it will take the system a few minutes to pull up the documents that are ready for you to approve. While it is processing, you will see a blank screen.

The screenshot shows the 'Performance Management' section of the TeamWorks system. The 'Approve Documents' link is highlighted with a black box and an arrow. Other visible links include 'View Approval Status', 'Approver Doc Status Report', 'Approver Review Rating Report', 'Manager Review Rating Report', 'Mass Approval', and 'Maintain Performance Notes'.

28. Click on **Performance Document “xxxx”** (the numbers will be different for each separate evaluation).

The screenshot shows the 'Select Transaction to Approve' page. The link 'Performance Document 49952' is highlighted with a black box and an arrow. Below the link is a table with the following data:

EmpID	Name	Job Title	Last Process Action	Last Processed By
00258955	Lisa Griffin	PersTech2	Submit	Angela Ledford

29. Click on **Performance Document Details**

The screenshot shows the 'Approve Transaction' page. The 'Performance Document Details' link is highlighted with a black box and an arrow. The page displays the following information:

**Approve Transaction**

For each employee below, approve or deny the proposed information. You may also enter optional comments about each approval choice. When you are finished, click the Save button at the bottom of the page.

The following transactions require approval.

Lisa Griffin EmpID: 00258955

**Performance Document**

Doc Type: Annual Performance Review

Author: Angela Ledford

Period Begin Date: 07/01/2009 Period End Date: 06/30/2010

Rating: 3-Successful Performance

**Performance Document Details**

Name	Role Name	Process Action	Process Action Date
Angela Ledford	Originator	Submit	06/24/2010
Lisa Maier	Manager Self Service		

### 30. Review the submitted evaluation (ratings and comments).

Enter ratings and comments for each section in this evaluation, if applicable. Save entries made on the evaluation by selecting the Save button.

[Save](#) [Return to Performance Document Approval](#)

[View Printable Evaluation](#) [Notify](#)

**Section 1 - Statewide Core Competencies**

**Customer Service**

**Description:** Understands that all employees have external and/or internal customers that they provide services and information to; honors all of the State's commitments to customers by providing helpful, courteous, accessible, responsive, and knowledgeable service.

**Comments:** This has been a great year for Sheila and customer service is one of her strengths. This past year, she received 6 compliment letters from customers. She was also nominated for and received a Governor's Excellence in Customer Service commendation in spring of 2010. Sheila is a role-model to other employees!

**Rating:** 4-Successful Performer - Plus 4.00

**Average Rating:** 4-Successful Performer - Plus 4.00

If you need to obtain additional approvals, click on the View Printable Evaluation link.

From there, you can print the evaluation, or copy/paste into a word document or email.

The Average Rating shows the rating that the employee submitted on their self-evaluation.  
The Rating is the rating assigned by the manager.

### 31. After you have finished reading/reviewing the evaluation, click on [Return to Performance Document Approval](#)

**Performance Document - Annual Performance Review**

**Manager Evaluation**

Lisa Griffin, TS: HR Transactions Tech (AL)  
Annual Performance Review: 07/01/2009 - 06/30/2010

**Author:** Angela Ledford **Role:** Manager  
**Status:** In Progress **Due Date:** 07/31/2010  
**Approval:** Submitted

Enter ratings and comments for each section in this evaluation, if applicable. Save entries made on the evaluation by selecting the Save button.

[Save](#) [Return to Performance Document Approval](#)

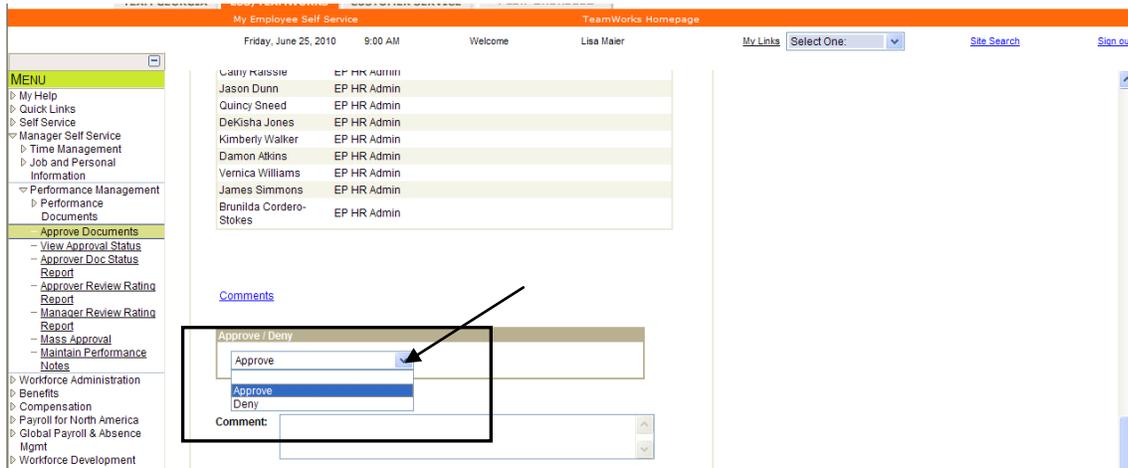
[View Printable Evaluation](#) [Notify](#)

**Section 1 - Statewide Core Competencies**

**Customer Service**

32. Scroll down to the bottom of the screen to the approve/deny drop down box. If you approve the evaluation, select approve. If you deny the evaluation, select deny.

**Note: Any rating other than 3 – Successful performer must be approved through the chain before you approve the document.**



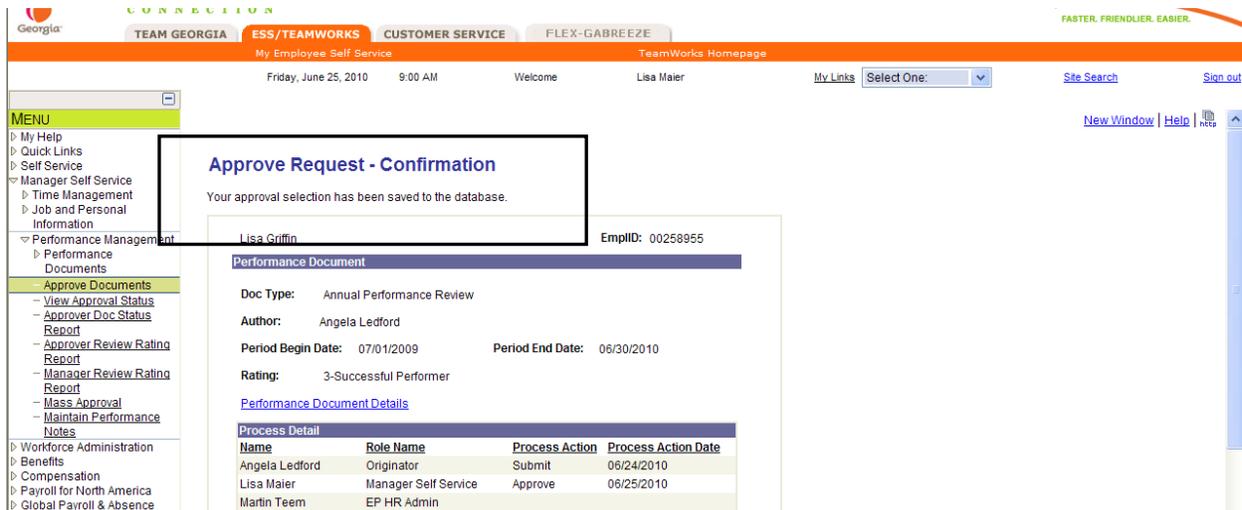
33. Click the **Save** button



34. Click the **OK** button



### 35. The Manager's Manager approval process is complete



**Approve Request - Confirmation**

Your approval selection has been saved to the database.

Lisa Griffin EmpID: 00258955

**Performance Document**

Doc Type: Annual Performance Review  
 Author: Angela Ledford  
 Period Begin Date: 07/01/2009 Period End Date: 06/30/2010  
 Rating: 3-Successful Performer

[Performance Document Details](#)

Name	Role Name	Process Action	Process Action Date
Angela Ledford	Originator	Submit	06/24/2010
Lisa Maier	Manager Self Service	Approve	06/25/2010
Martin Teem	EP HR Admin		

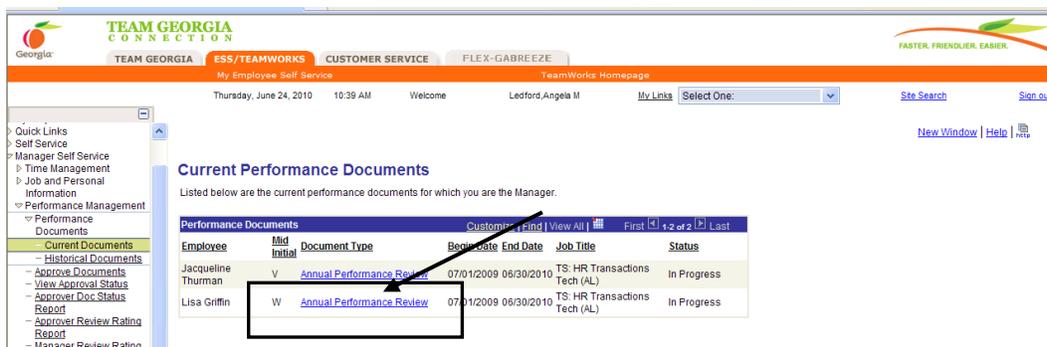
Human Resources is required to approve all evaluations in the system. HR will only review the content for evaluations with a rating of 1- Unsatisfactory Performer or 2 – Successful Performer – Minus. Evaluations with all other ratings will be automatically approved by HR daily during the evaluation process.

### Manager: Steps to finalizing the Evaluation (after approvals have been received)

All approvals have been received and Managers are now ready to complete the evaluation process.

### 36. Log in to the e-performance system (following steps 1 through 5)

37. Click on [Annual Performance Review](#) for the employee that you are ready to evaluate.



**Current Performance Documents**

Listed below are the current performance documents for which you are the Manager.

Employee	Mid Initial	Document Type	Begin Date	End Date	Job Title	Status
Jacqueline Thurman	V	Annual Performance Review	07/01/2009	06/30/2010	TS, HR Transactions Tech (AL)	In Progress
Lisa Griffin	W	Annual Performance Review	07/01/2009	06/30/2010	TS, HR Transactions Tech (AL)	In Progress

38. In the “Complete Manager Evaluation” step, click [Edit](#) to open the evaluation.

My Employee Self Service TeamWorks Homepage  
Friday, June 25, 2010 10:21 AM Welcome Ledford, Angela M My Links Select One: Site Search Sign out  
New Window Help

Quick Links  
Self Service  
Manager Self Service  
Time Management  
Job and Personal Information  
Performance Management  
Performance Documents  
Current Documents  
Historical Documents  
Approve Documents  
View Approval Status  
Approver Doc Status Report  
Approver Review Rating Report  
Manager Review Rating Report  
Mass Approval  
Maintain Performance Notes  
Workforce Administration  
Benefits  
Compensation  
Payroll for North America

**Current Performance Documents**  
**Document Details**  
Lisa Griffin, TS: HR Transactions Tech (AL)  
Annual Performance Review: 07/01/2009 - 06/30/2010

**Performance Document Details**  
Employee: Lisa Griffin Job Title: TS: HR Transactions Tech (AL)  
Document Type: Annual Performance Review Period: 07/01/2009 - 06/30/2010  
Manager: Angela Ledford Status: In Progress  
Template Name: Annual Performance Review

**Document Progress**

Step	Status	Due Date	View
Establish Evaluation Criteria	Completed	01/01/2010	View
Review Self Evaluation	Completed	07/31/2010	View
Complete Manager Evaluation	In Progress	07/31/2010	Edit

[Return to Select Documents](#)

39. Click the **Available for Review** button.

My Employee Self Service TeamWorks Homepage  
Friday, June 25, 2010 10:21 AM Welcome Ledford, Angela M My Links Select One: Site Search Sign out  
New Window Help

Quick Links  
Self Service  
Manager Self Service  
Time Management  
Job and Personal Information  
Performance Management  
Performance Documents  
Current Documents  
Historical Documents  
Approve Documents  
View Approval Status  
Approver Doc Status Report  
Approver Review Rating Report  
Manager Review Rating Report  
Mass Approval  
Maintain Performance Notes  
Workforce Administration  
Benefits  
Compensation  
Payroll for North America  
Global Payroll & Absence Mgmt

**Performance Document - Annual Performance Review**  
**Manager Evaluation**  
Lisa Griffin, TS: HR Transactions Tech (AL)  
Annual Performance Review: 07/01/2009 - 06/30/2010

Author: Angela Ledford Role: Manager  
Status: In Progress Due Date: 07/31/2010  
Approval: Approved

Enter ratings and comments for each section in this evaluation, if applicable. Save entries made on the evaluation by selecting the Save button.

[Return to Document Detail](#)

**Section 1 - Statewide Core Competencies**

40. Click on the **OK** button

My Employee Self Service TeamWorks Homepage  
Friday, June 25, 2010 10:21 AM Welcome Ledford, Angela M My Links Select One: Site Search Sign out  
New Window Help

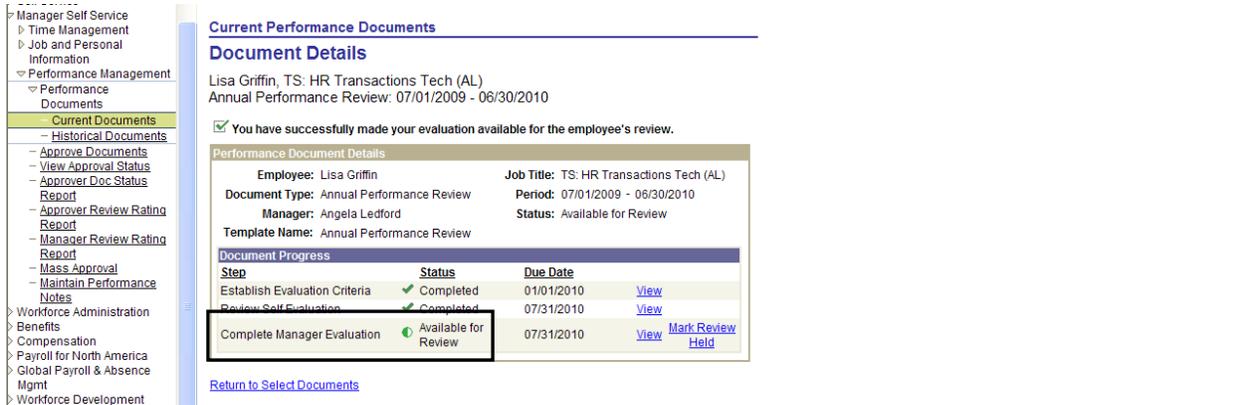
Quick Links  
Self Service  
Manager Self Service  
Time Management  
Job and Personal Information  
Performance Management  
Performance Documents  
Current Documents  
Historical Documents  
Approve Documents  
View Approval Status  
Approver Doc Status Report  
Approver Review Rating Report  
Manager Review Rating Report

**Performance Document - Annual Performance Review**  
**Available for Review**  
Lisa Griffin, TS: HR Transactions Tech (AL)  
Annual Performance Review: 07/01/2009 - 06/30/2010

You have chosen to allow the employee to view this evaluation. To confirm that the employee can view evaluation, click the OK button.

41. Schedule the performance evaluation meeting with the employee

It is now time to meet with the employee to discuss the evaluation and ratings.



**Current Performance Documents**

**Document Details**

Lisa Griffin, TS: HR Transactions Tech (AL)  
Annual Performance Review: 07/01/2009 - 06/30/2010

You have successfully made your evaluation available for the employee's review.

**Performance Document Details**

Employee:	Lisa Griffin	Job Title:	TS: HR Transactions Tech (AL)
Document Type:	Annual Performance Review	Period:	07/01/2009 - 06/30/2010
Manager:	Angela Ledford	Status:	Available for Review
Template Name:	Annual Performance Review		

**Document Progress**

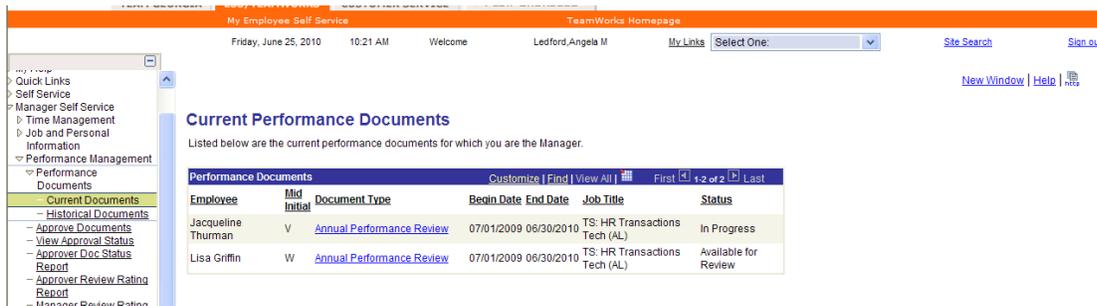
Step	Status	Due Date	
Establish Evaluation Criteria	Completed	01/01/2010	<a href="#">View</a>
Review Self Evaluation	Completed	07/31/2010	<a href="#">View</a>
Complete Manager Evaluation	Available for Review	07/31/2010	<a href="#">View</a> <a href="#">Mark Review Held</a>

[Return to Select Documents](#)

42. Hold the performance evaluation meeting with the employee.

43. Log in to the e-performance system (following steps 1 through 5).

44. Click on the [Annual Performance Review](#) link for the employee that you have met with.

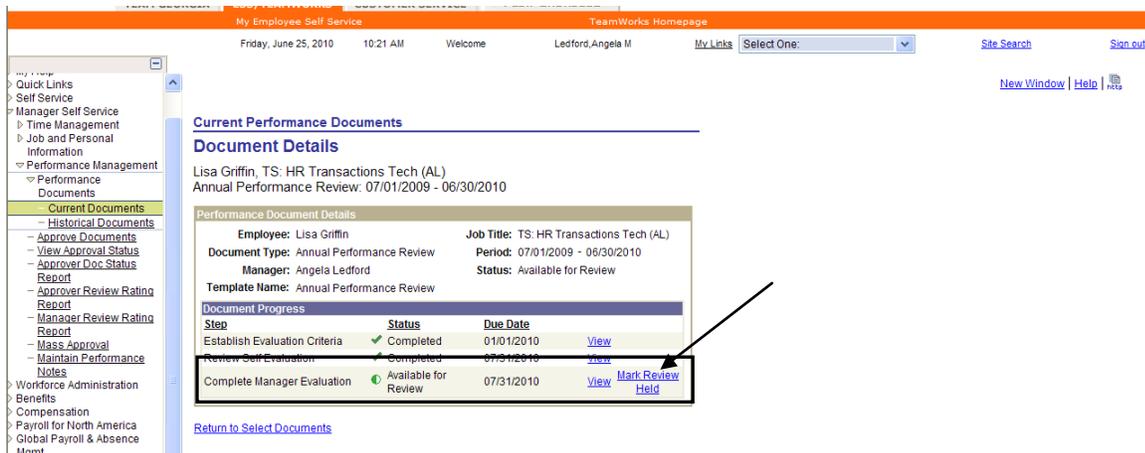


**Current Performance Documents**

Listed below are the current performance documents for which you are the Manager.

Employee	Mid Initial	Document Type	Begin Date	End Date	Job Title	Status
Jacqueline Thurman	V	<a href="#">Annual Performance Review</a>	07/01/2009	06/30/2010	TS: HR Transactions Tech (AL)	In Progress
Lisa Griffin	W	<a href="#">Annual Performance Review</a>	07/01/2009	06/30/2010	TS: HR Transactions Tech (AL)	Available for Review

45. Click on the [Mark Review Held](#) link.



**Current Performance Documents**

**Document Details**

Lisa Griffin, TS: HR Transactions Tech (AL)  
Annual Performance Review: 07/01/2009 - 06/30/2010

**Performance Document Details**

Employee:	Lisa Griffin	Job Title:	TS: HR Transactions Tech (AL)
Document Type:	Annual Performance Review	Period:	07/01/2009 - 06/30/2010
Manager:	Angela Ledford	Status:	Available for Review
Template Name:	Annual Performance Review		

**Document Progress**

Step	Status	Due Date	
Establish Evaluation Criteria	Completed	01/01/2010	<a href="#">View</a>
Review Self Evaluation	Completed	07/31/2010	<a href="#">View</a>
Complete Manager Evaluation	Available for Review	07/31/2010	<a href="#">View</a> <a href="#">Mark Review Held</a>

[Return to Select Documents](#)

46. Click the **Review Held** button to indicate that you have held the performance evaluation discussion meeting with the employee.

**Performance Document - Annual Performance Review**  
**Manager Evaluation**  
 Lisa Griffin, TS: HR Transactions Tech (AL)  
 Annual Performance Review: 07/01/2009 - 06/30/2010

Author: Angela Ledford      Role: Manager  
 Status: Available for Review      Due Date: 07/31/2010  
 Approval: Approved

The status of this evaluation is Available for Review. In this status, you may enter comments in the Manager Comments section, if applicable.

At any time you can save any entries you make on the evaluation by selecting the Save button. If you are ready to confirm that the review was held with the employee, click the Review Held button to notify the employee they are able to acknowledge the evaluation.

Save    **Review Held**    Cancel    Return to Document Detail

[View Printable Evaluation](#)    [Notify](#)

47. Click the **OK** button

**Performance Document - Annual Performance Review**  
**Review Held**  
 Lisa Griffin, TS: HR Transactions Tech (AL)  
 Annual Performance Review: 07/01/2009 - 06/30/2010

You have chosen to confirm that the performance review was held for this document. To confirm that a review was conducted, click the OK button.

OK    Cancel

The status is changed to Review Held.

**Current Performance Documents**  
**Document Details**  
 Lisa Griffin, TS: HR Transactions Tech (AL)  
 Annual Performance Review: 07/01/2009 - 06/30/2010

You have successfully marked the review held for your evaluation.

Performance Document Details

Employee:	Lisa Griffin	Job Title:	TS: HR Transactions Tech (AL)
Document Type:	Annual Performance Review	Period:	07/01/2009 - 06/30/2010
Manager:	Angela Ledford	Status:	Review Held
Template Name:	Annual Performance Review		

Step	Status	Due Date	
Establish Evaluation Criteria	Completed	01/01/2010	<a href="#">View</a>
Review Self Evaluation	Completed	07/31/2010	<a href="#">View</a>
Complete Manager Evaluation	Review Held	07/31/2010	<a href="#">View</a> <a href="#">Acknowledge</a>

[Return to Select Documents](#)

The system will send an email to the employee (see below) that prompts the employee to log in and acknowledge that the meeting was held. When the employee completes this step, it affirms that the review was held and discussed in detail with the employee.

This step is necessary now that we do not have paper copies and employee signatures on the official evaluation document.

**EMPLOYEE EMAIL**

From: Employee Self Service Email [mailto:SAO\_PS\_email@sao.ga.gov]  
 Sent: Tuesday, June 22, 2010 10:26 AM  
 To: Lisa Griffin  
 Subject: Your Annual Performance Review form is ready for your acknowledgement.

This automatic notification is to remind you that your Annual Performance Review has been held and the document is ready for your final comments and acknowledgement. (Your acknowledgement affirms that this review was held and was discussed in detail with you).

You may click on this link to go directly to the application:  
[https://team.state.ga.us/psp/saopa/EMPLOYEE/EMPL/h/?tab=PAPP\\_GUEST](https://team.state.ga.us/psp/saopa/EMPLOYEE/EMPL/h/?tab=PAPP_GUEST)

(Please do not respond to this automatic notification.)

Once the employee has acknowledged the evaluation, the manager will receive an email notification (see below)

**MANAGER EMAIL**

From: Employee Self Service Email [mailto:SAO\_PS\_email@sao.ga.gov]  
 Sent: Tuesday, June 22, 2010 10:28 AM  
 To: Angie Ledford  
 Subject: Lisa Griffin has acknowledged the Annual Performance Review form.

This automatic notification is to alert you that Lisa Griffin has formally acknowledged the recent review of the Annual Performance Review document.

You may click on this link to go directly to this Annual Performance Review and click complete to finalize the document: [https://team.state.ga.us/psp/saopa/EMPLOYEE/EMPL/h/?tab=PAPP\\_GUEST](https://team.state.ga.us/psp/saopa/EMPLOYEE/EMPL/h/?tab=PAPP_GUEST)  
 (Please do not respond to this automatic notification.)

**48. Log in to the e-performance system (following steps 1 through 5)****49. Click on [Annual Performance Review](#) for the employee that you have met with.**

The screenshot shows the 'My Employee Self Service' interface. The main content area is titled 'Current Performance Documents' and lists documents for which the user is the manager. A table displays the following data:

Employee	Mid Initial	Document Type	Begin Date	End Date	Job Title	Status
Jacqueline Thurman	V	Annual Performance Review	07/01/2009	06/30/2010	TS: HR Transactions Tech (AL)	In Progress
Lisa Griffin	W	Annual Performance Review	07/01/2009	06/30/2010	TS: HR Transactions Tech (AL)	Acknowledged

## 50. Click on the **Complete** link

My Employee Self Service TeamWorks Homepage  
Friday, June 25, 2010 11:51 AM Welcome Ledford, Angela M My Links Select One: Site Search Sign out  
New Window | Help

**Current Performance Documents**  
**Document Details**  
Lisa Griffin, TS: HR Transactions Tech (AL)  
Annual Performance Review: 07/01/2009 - 06/30/2010

Performance Document Details  
Employee: Lisa Griffin Job Title: TS: HR Transactions Tech (AL)  
Document Type: Annual Performance Review Period: 07/01/2009 - 06/30/2010  
Manager: Angela Ledford Status: Acknowledged  
Template Name: Annual Performance Review

Document Progress			
Step	Status	Due Date	
Establish Evaluation Criteria	Completed	01/01/2010	<a href="#">View</a>
Review Self Evaluation	Completed	07/31/2010	<a href="#">View</a>
Complete Manager Evaluation	Acknowledged	07/31/2010	<a href="#">View</a> <a href="#">Complete</a>

[Return to Selected Documents](#)

## 51. Click on the **Complete** button

My Employee Self Service TeamWorks Homepage  
Friday, June 25, 2010 11:51 AM Welcome Ledford, Angela M My Links Select One: Site Search Sign out  
New Window | Help

**Performance Document - Annual Performance Review**  
**Manager Evaluation**  
Lisa Griffin, TS: HR Transactions Tech (AL)  
Annual Performance Review: 07/01/2009 - 06/30/2010

Author: Angela Ledford Role: Manager  
Status: Acknowledged Due Date: 07/31/2010  
Approval: Approved

The status of this evaluation is Acknowledged. In this status, you may enter comments in the Manager Comments section, if applicable.

At any time you can save any entries you make on the evaluation by selecting the Save button. If you are ready to submit the evaluation for approval, click the Submit for Approval button to route the document through the appropriate approval process. If approval is not required then click the Complete button.

[Save](#) [Complete](#) [Cancel](#) [Return to Document Detail](#)

[View Printable Evaluation](#) [Notify](#)

## 52. Click on the **OK** button

This completes the evaluation process and moves the evaluation from current documents to historical documents.

my help  
Quick Links  
Self Service  
Manager Self Service  
Time Management  
Job and Personal Information  
Performance Management  
Performance Documents  
Current Documents  
Historical Documents  
Approve Documents

Main Menu > Manager Self Service > Performance Management >  
**Performance Documents**  
Create, update, and view performance documents for your workforce.

**Current Documents**  
Update or view your employees' performance documents for the current period.

**Historical Documents**  
View your employees' completed performance documents.