

ePerformance Management Training Tool

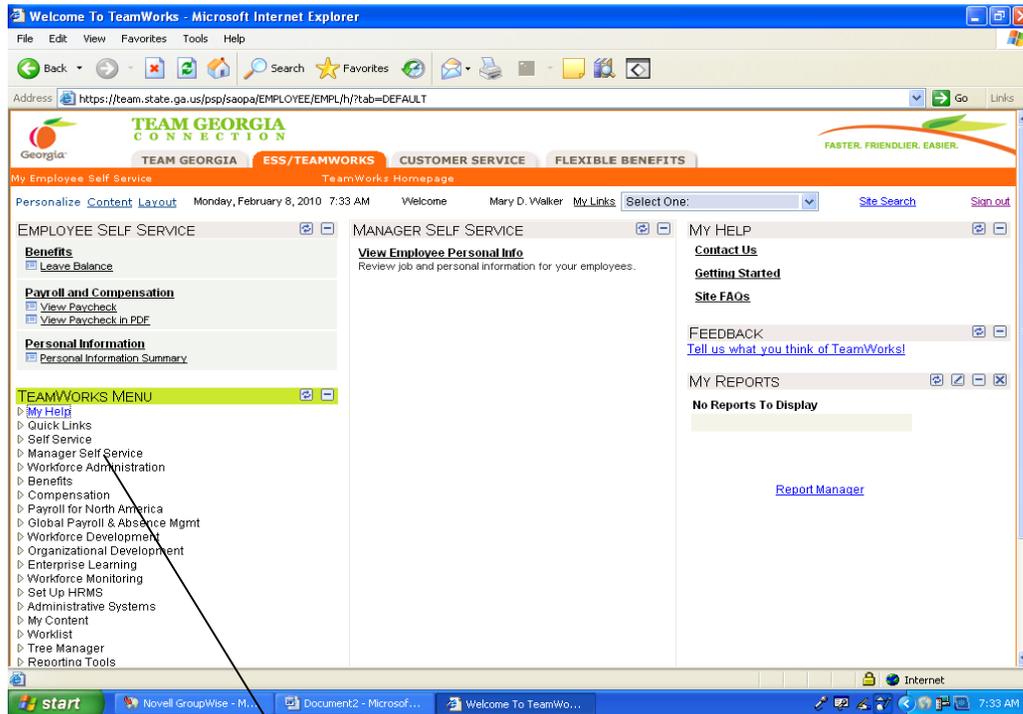


Creating Performance Plans

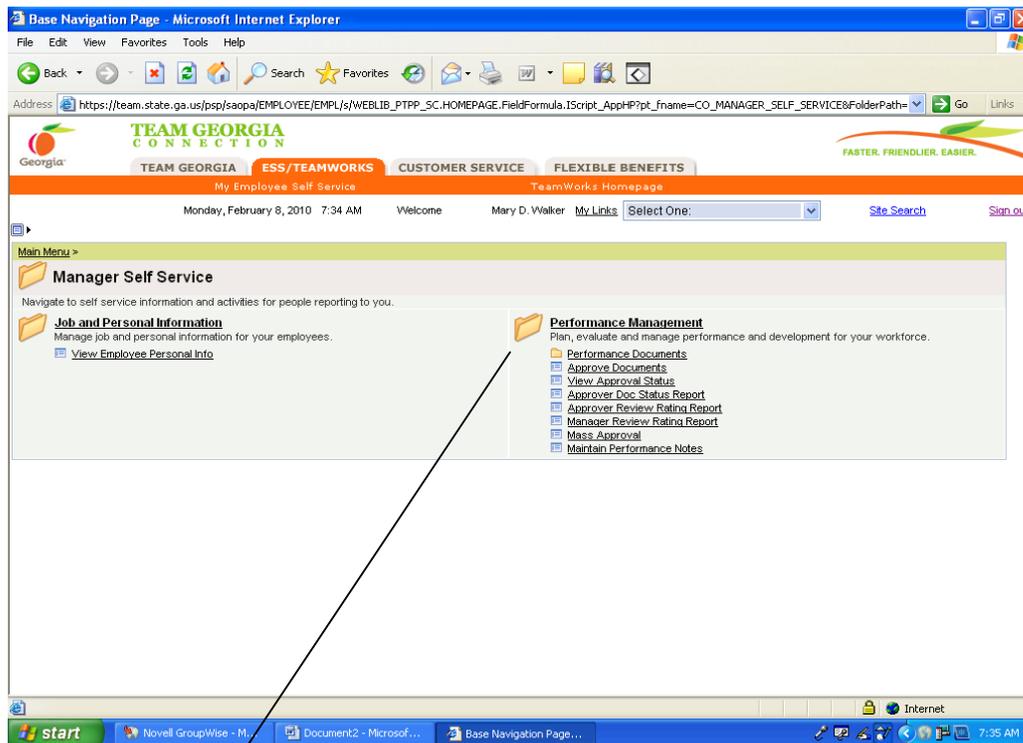
Sponsored by: OHRMD

Navigation to Manager Self-Service

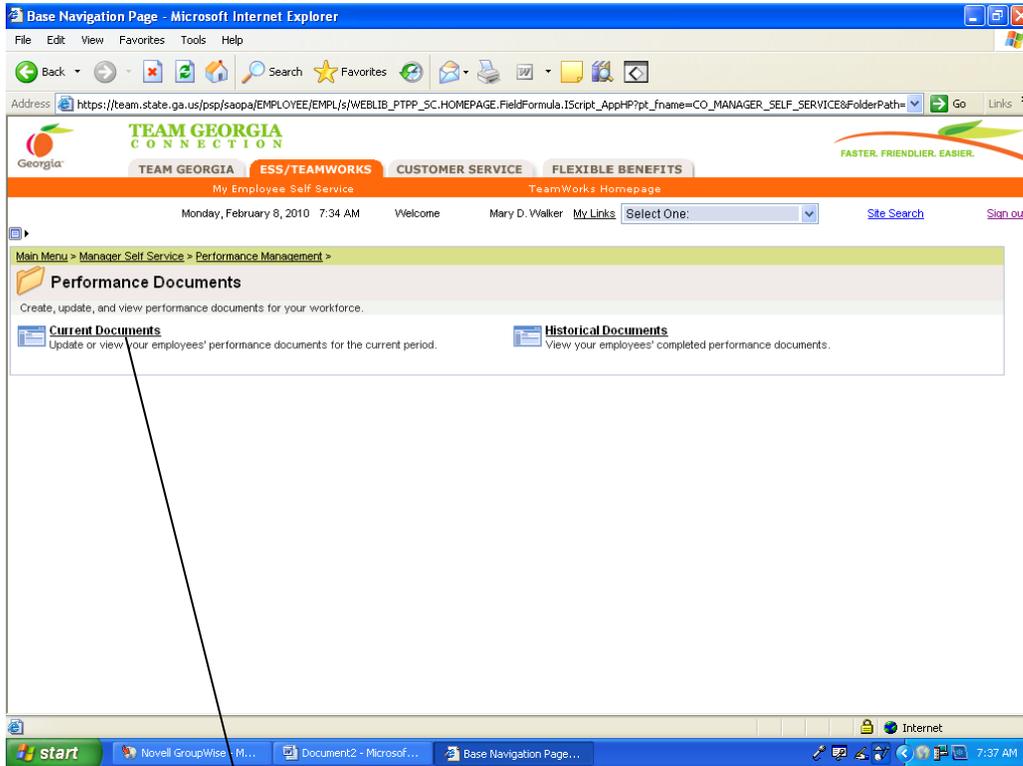
Step 1: Access current performance documents for direct reports.



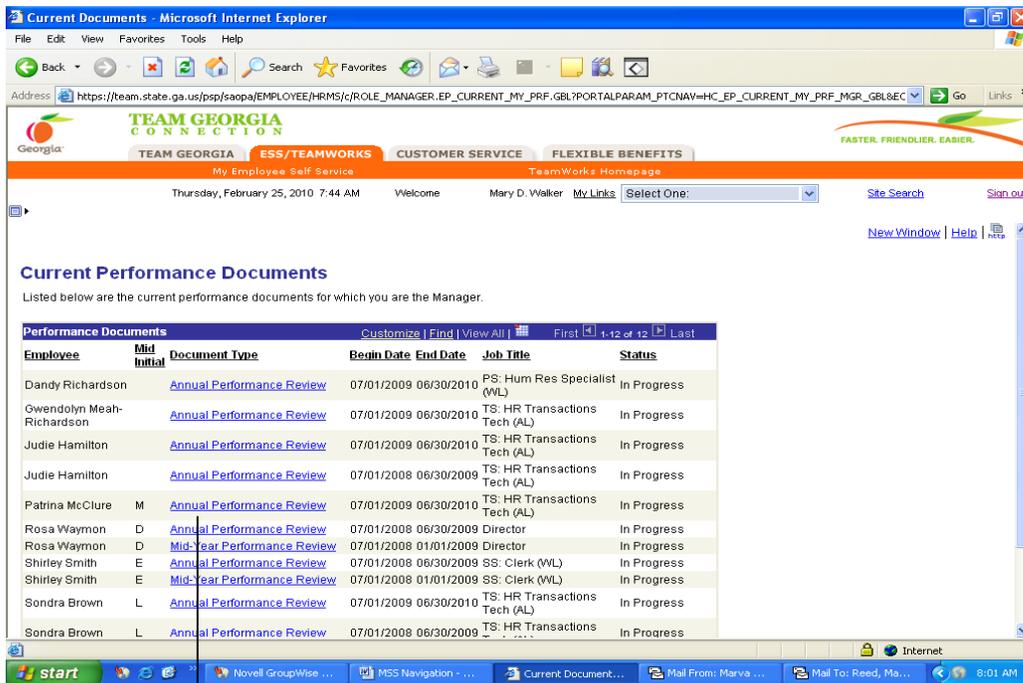
Click on the **Manager Self Service Link**



Select **Performance Documents**.



Select **Current Documents** for a list of direct reports.



Click "**Annual Performance Review**" link corresponding to the appropriate employee.

NOTE: If you do not have all of your direct reports listed or if an employee is listed you do not supervise, contact your HR Office.

Step 2: Establish Evaluation Criteria:

The screenshot shows a web browser window displaying the TEAM GEORGIA CONNECTION portal. The page title is "Current Performance Documents" and "Document Details". The document is for Sondra Brown, TS: HR Transactions Tech (AL), with an Annual Performance Review period from 07/01/2009 to 06/30/2010. The document is currently "In Progress".

Performance Document Details

Employee: Sondra Brown	Job Title: TS: HR Transactions Tech (AL)
Document Type: Annual Performance Review	Period: 07/01/2009 - 06/30/2010
Manager: Mary Walker	Status: In Progress
Template Name: Annual Performance Review	

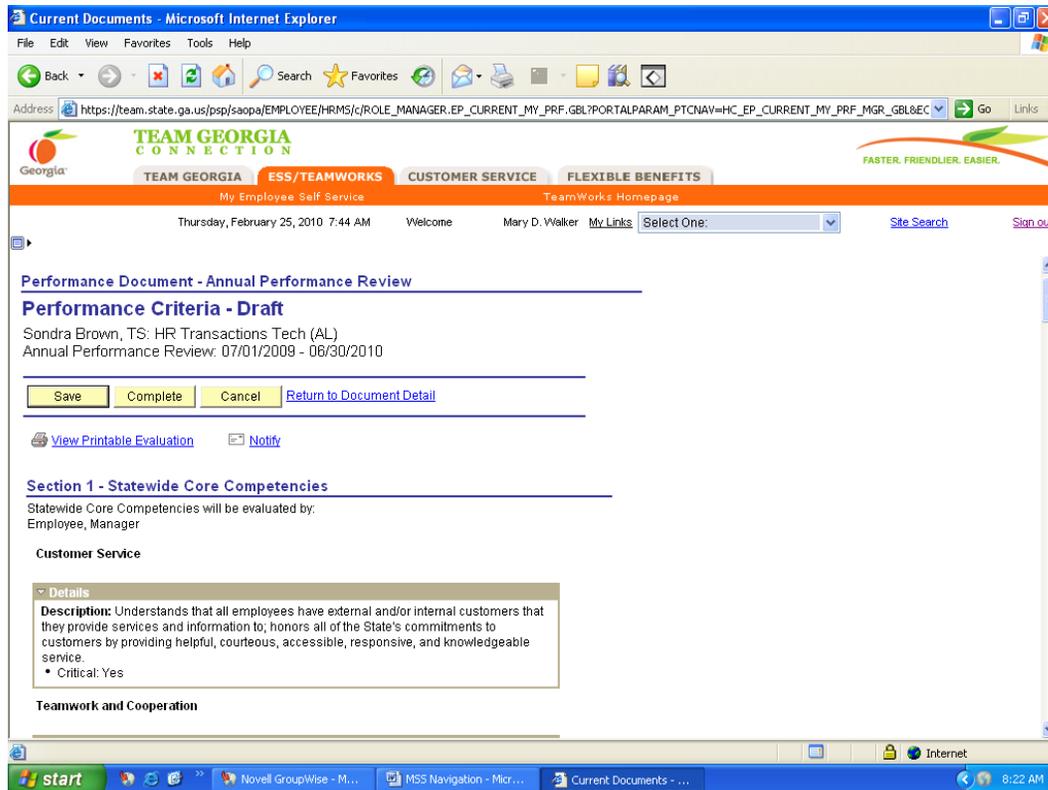
Document Progress

Step	Status	Due Date	
Establish Evaluation Criteria	<input type="radio"/> Not Started	01/01/2010	Start
Review Self Evaluation	<input type="radio"/> Not Started	07/31/2010	
Complete Manager Evaluation	<input type="radio"/> Not Started	07/31/2010	

[Return to Select Documents](#)

The first step in the process is to Establish Evaluation Criteria. Click on the **Start** link. If the document was previously opened, an **Edit** link will be displayed. To begin the process, click on either the Start or Edit link.

Section 1 – Statewide Core Competencies



These competencies are pre-populated for all employees. You cannot add or delete in this section.

There are five Statewide Core Competencies.

- Customer Service Orientation
- Teamwork and Cooperation
- Results Orientation
- Accountability
- Judgment and Decision Making

There are two additional Leadership Competencies pre-populated for employees in managerial jobs.

- Transformers of Government
- Talent Management

NOTE: If your Manager's plan does not have the two additional Leadership Core Competencies they can be added in Section 2.

Section 1 – Statewide Core Competencies (continued)

The screenshot shows a Microsoft Internet Explorer browser window displaying the 'TEAM GEORGIA CONNECTION' website. The page is titled 'My Employee Self Service' and 'TeamWorks Homepage'. The date and time are 'Thursday, February 25, 2010 7:44 AM'. The user is logged in as 'Mary D. Walker'. The page content includes three core competency sections:

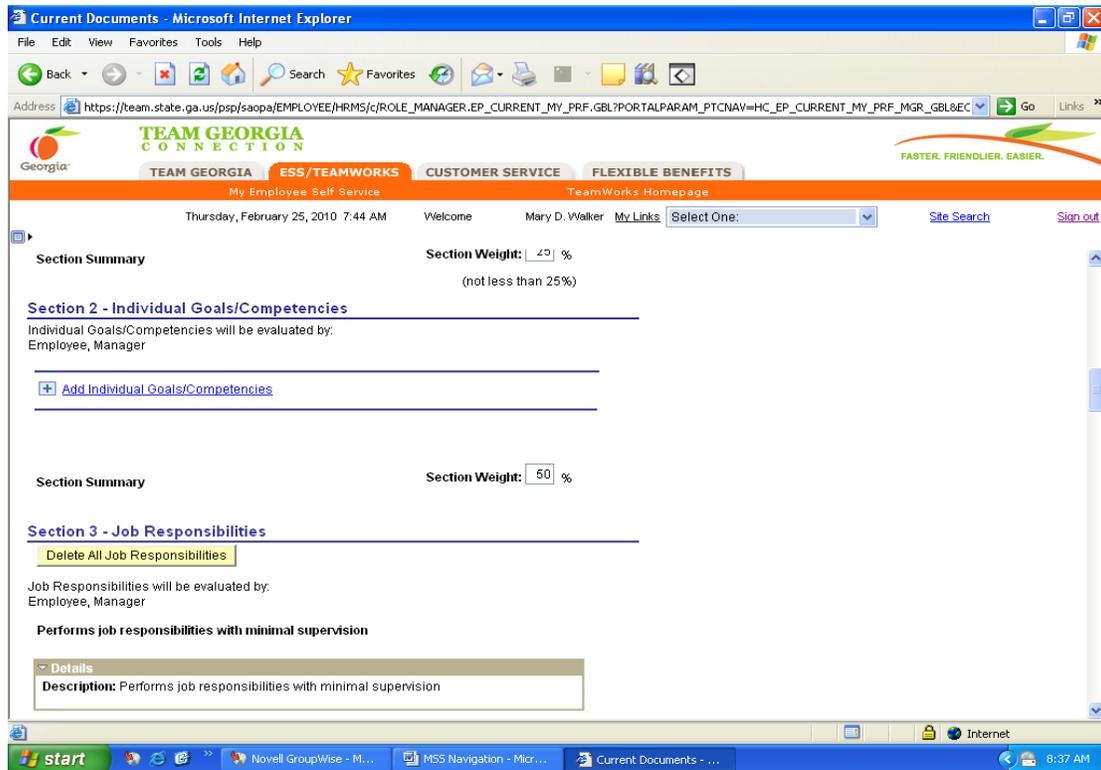
- Results Orientation**
 - Description:** Consistently delivers required business results; sets and achieves achievable, yet aggressive, goals; consistently complies with quality standards and meets deadlines; maintains focus on Agency and State goals.
 - Critical:** Yes
- Accountability**
 - Description:** Accepts full responsibility for self and contribution as a team member; displays honesty and truthfulness; confronts problems quickly; displays a strong commitment to organizational success and inspires others to commit to goals; demonstrates a commitment to delivering on his/her public duty and presenting oneself as a credible representative of the Agency and State to maintain the public's trust.
 - Critical:** Yes
- Judgement and Decision Making**
 - Description:** Analyzes problems by evaluating available information and resources; develops effective, viable solutions to problems that can help drive the effectiveness of the department and/or State of Georgia.
 - Critical:** Yes

At the bottom of the page, the 'Section Summary' section shows 'Section Weight: 25 %'. An arrow points from the '25' in the weight field to the text below.

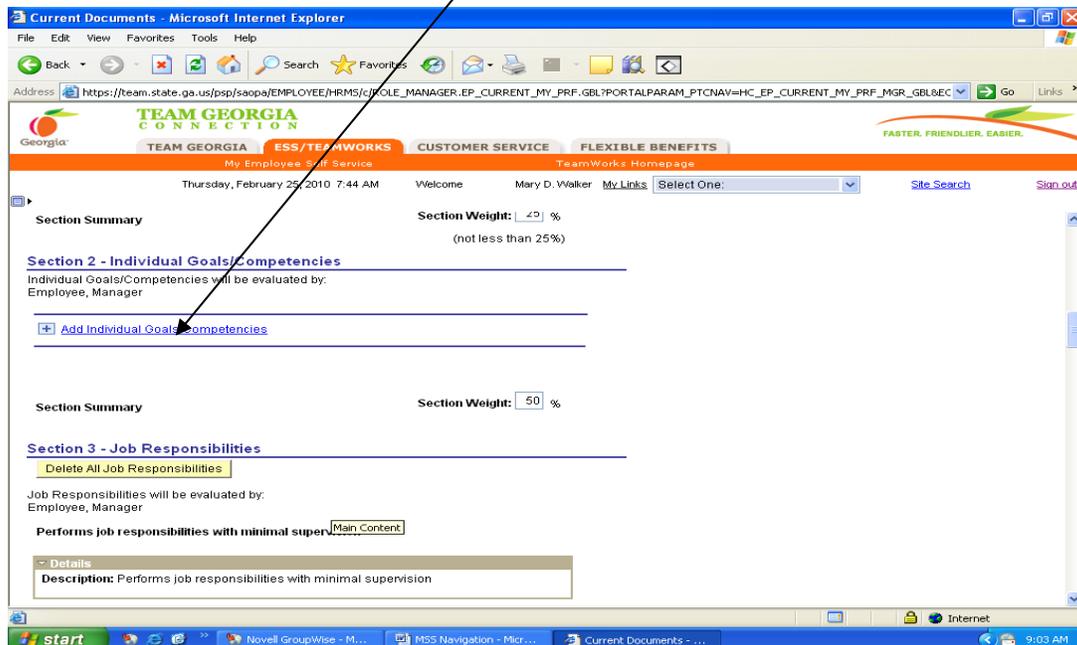
The section has a pre-populated weight of 25%, which is the minimum weight for the section.

Section 2: Individual Goals/Competencies

This section is not pre-populated with goals and competencies. The Manager has the option to add their own goals and competencies or use the system's pre-defined goals.



To add pre-defined goals, click on **Add Individual Goals/Competencies** link.

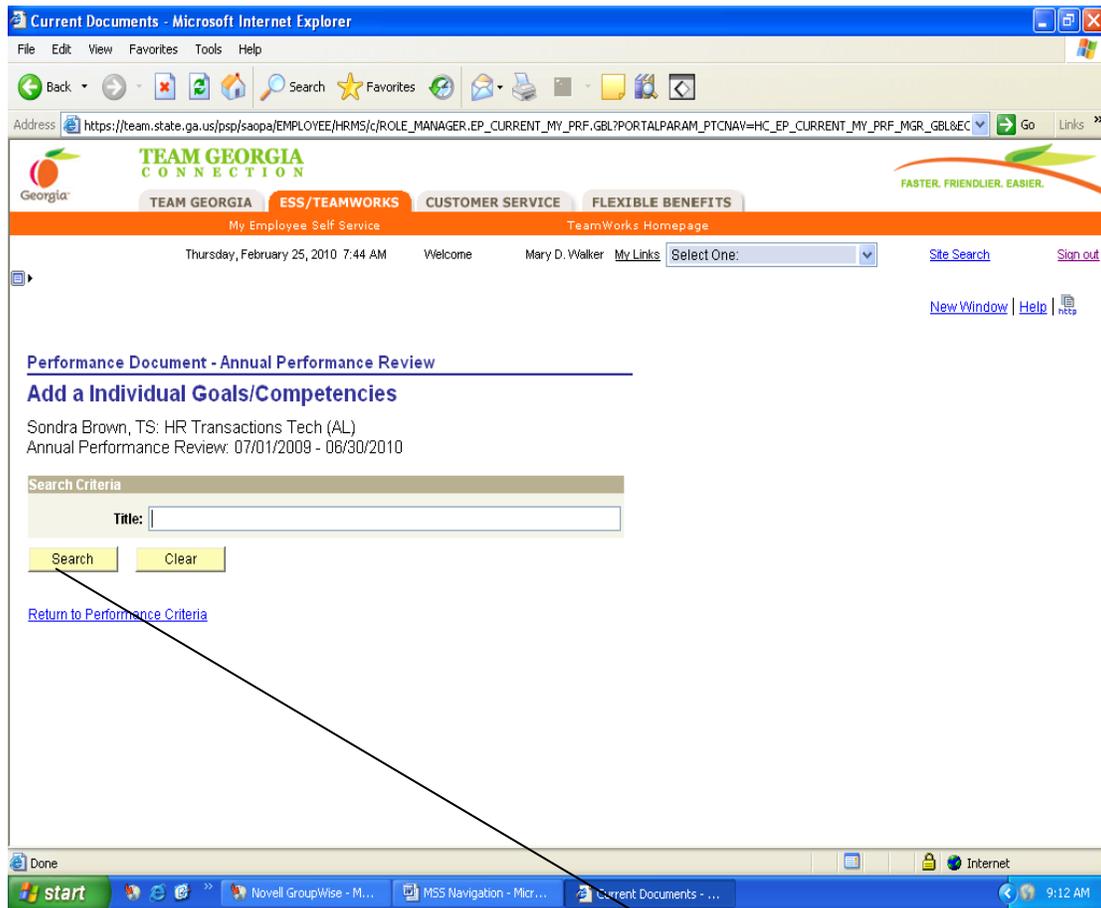


Section 2: Individual Goals/Competencies (continued)

The screenshot shows a Microsoft Internet Explorer browser window with the address bar displaying a URL from team.state.ga.us. The website header includes the 'TEAM GEORGIA CONNECTION' logo and navigation tabs for 'TEAM GEORGIA', 'ESS/TEAMWORKS', 'CUSTOMER SERVICE', and 'FLEXIBLE BENEFITS'. The main content area is titled 'Performance Document - Annual Performance Review' and contains an 'Add an Item' section. Under this section, the user 'Sondra Brown, TS: HR Transactions Tech (AL)' is shown with an 'Annual Performance Review' period of '07/01/2009 - 06/30/2010'. There are two radio buttons: 'Add pre-defined item' (which is selected) and 'Add your own item'. Below the radio buttons is a yellow 'Next' button. A black arrow originates from the 'Next' button and points to the 'Next' button in the Windows taskbar at the bottom of the browser window.

NOTE: The radial button defaults to “Add pre-define item.” Click **Next**.

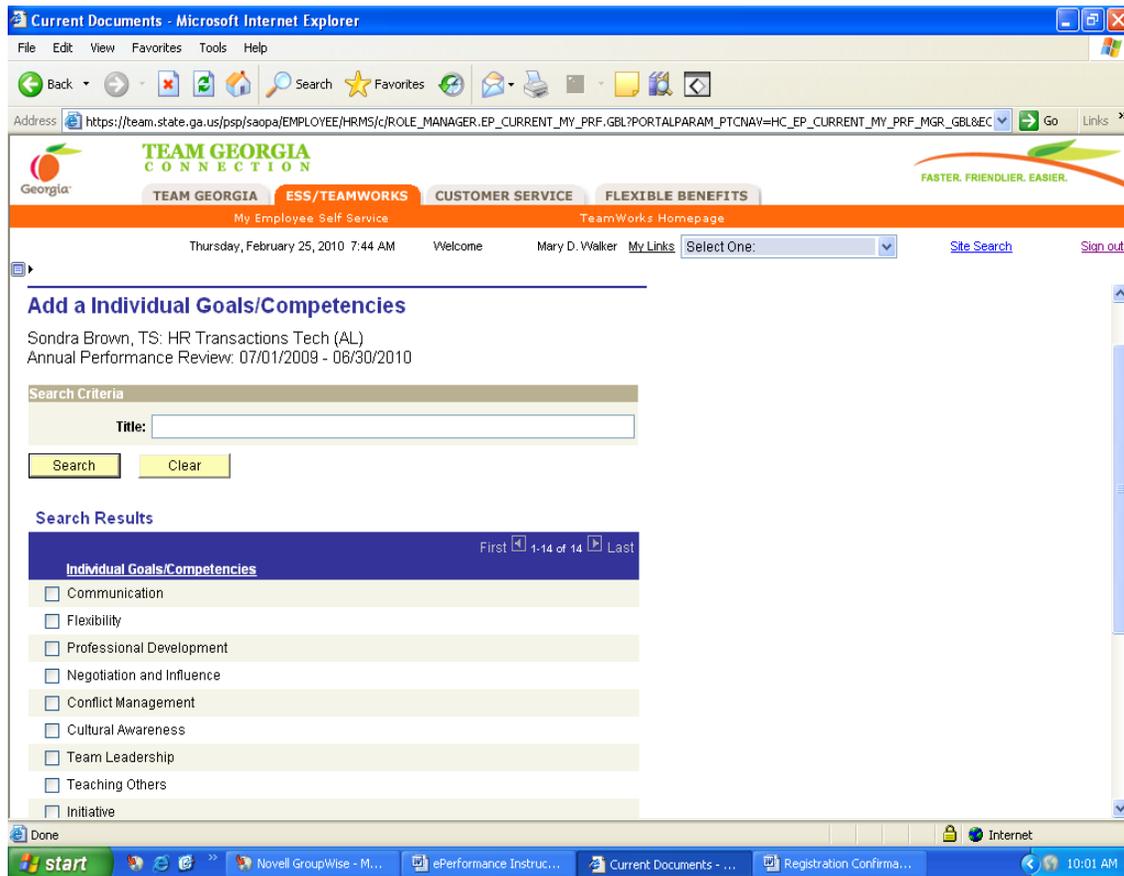
Section 2: Individual Goals/Competencies (continued)



The screenshot shows a web browser window displaying the TEAM GEORGIA CONNECTION portal. The page title is "Performance Document - Annual Performance Review" and the sub-heading is "Add a Individual Goals/Competencies". The user is identified as "Sondra Brown, TS: HR Transactions Tech (AL)" for an "Annual Performance Review: 07/01/2009 - 06/30/2010". Below the heading is a "Search Criteria" section with a "Title:" input field and "Search" and "Clear" buttons. A black arrow points from the "Search" button to the text below.

The manager can add a goal or competency by clicking the search button.

Section 2: Individual Goals/Competencies (continued)



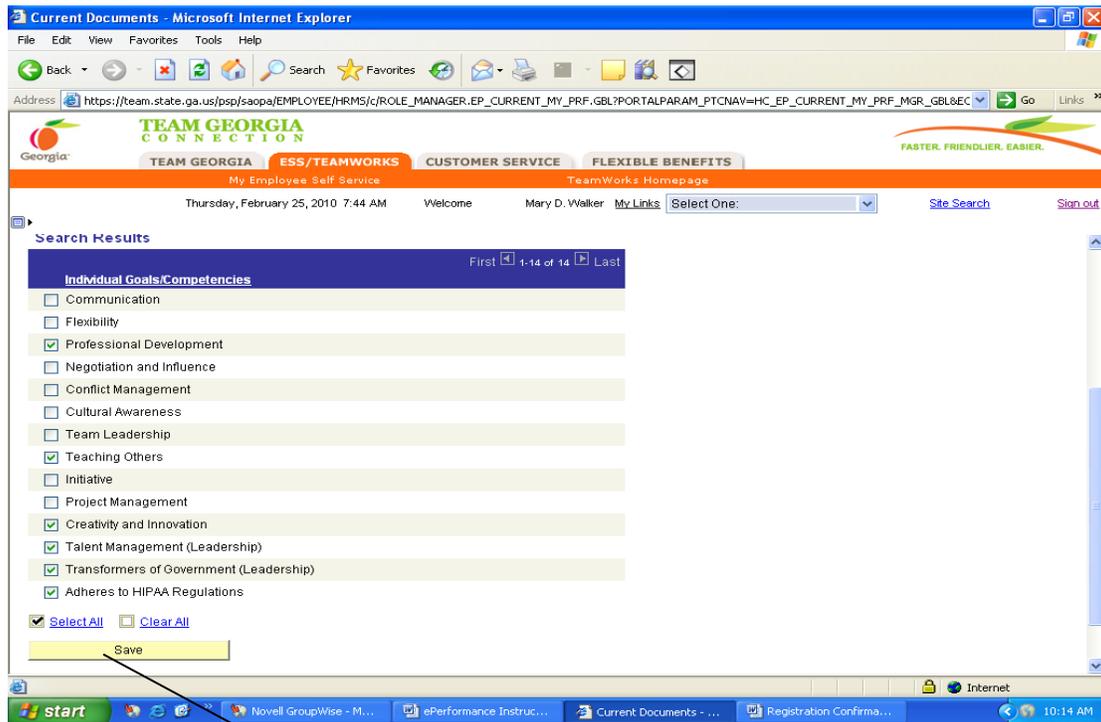
The search results will display a list of Individual Goals/Competencies.

The manager can select desired goals by clicking into the checkbox beside each goal to be added to the performance plan. The description of each goal can be viewed after the goal is added to the plan.

Optimal number of goals—it is recommended that there are no more than six goals.

NOTE: Each goal or competency will be rated individually during the performance evaluation period.

Section 2: Individual Goals/Competencies (continued)



After making selections, click the **save** box.

NOTE: If you supervise a manager and the two Leadership core competencies did not pre-populate in Section 1, click the checkbox beside Talent Management and Transformers of Government.

Also, if an employee is required to adhere to HIPAA regulations the option to add that goal is listed.

Section 2: Individual Goals/Competencies (continued)

The screenshot shows a web browser window with the URL https://team.state.ga.us/psp/soopa/EMPLOYEE/HRMS/c/ROLE_MANAGER_EP_CURRENT_MY_PRF_GBL?PORTALPARAM_PTCNAV=HC_EP_CURRENT_MY_PRF_MGR_GBL&EC. The page header includes the 'TEAM GEORGIA CONNECTION' logo and navigation tabs for 'TEAM GEORGIA', 'ESS/TEAMWORKS', 'CUSTOMER SERVICE', and 'FLEXIBLE BENEFITS'. The main content area is titled 'Section 2 - Individual Goals/Competencies' and contains the following information:

- Professional Development**
 - Description:** Demonstrates a commitment to professional development by proactively seeking opportunities to learn new capabilities, skills, and knowledge; acquires the skills needed to continually enhance his/her contribution to the State and to his/her respective profession.
 - Buttons: [+ Add Individual Goals/Competencies](#) [Delete](#)
- Teaching Others**
 - Description:** Enhances the capabilities of the organization by openly and effectively sharing his/her subject matter expertise with others; supports a continuous learning environment by preserving and compiling intellectual capital which can be used by others within his/her work group, department and State entities, as appropriate.
 - Buttons: [+ Add Individual Goals/Competencies](#) [Delete](#)

Section 2 has been populated with your selected goals. You have the option to delete any goals you determine inappropriate. The system will prompt you to confirm your deletion.

When working in this section, it is highly recommended you periodically save your data by clicking the save button at the top of the plan.

Section 2: Individual Goals/Competencies (continued)

The screenshot shows the TEAM GEORGIA CONNECTION website interface. The top navigation bar includes 'TEAM GEORGIA', 'ESS/TEAMWORKS', 'CUSTOMER SERVICE', and 'FLEXIBLE BENEFITS'. The main content area is titled 'Section 2 - Individual Goals/Competencies' and includes a 'Section Weight' of 25%. Below this, there is a link labeled '+ Add Individual Goals/Competencies'. A black arrow points from this link down to the text below. Below the link, there is another section titled 'Section 3 - Job Responsibilities' with a 'Section Weight' of 50%. A 'Main Content' box contains the text 'Performs job responsibilities with minimal supervision' and a 'Details' box below it with the description 'Performs job responsibilities with minimal supervision'.

Click on the “Add Individual Goals/Competencies” link to add your own goal.

The screenshot shows the TEAM GEORGIA CONNECTION website interface. The top navigation bar is the same as in the previous screenshot. The main content area is titled 'Performance Document - Annual Performance Review' and includes a section for 'Add an Item'. Under 'Add an Item', there are two radio button options: 'Add pre-defined item' and 'Add your own item'. The 'Add your own item' option is selected. Below the radio buttons is a yellow 'Next' button. A black arrow points from the 'Next' button down to the text below. Below the 'Next' button, there is a link labeled 'Return to Performance Criteria'.

When adding your own individual goals and competencies, click on “Add Your Own Item” then select the **Next** button.

Section 2: Individual Goals/Competencies (continued)

Current Documents - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address https://team.state.ga.us/bsp/soapa/EMPLOYEE/HRMS/c/ROLE_MANAGER_EP_CURRENT_MY_PROF.GBL?PORTALPARAM_PTCNAV=HC_EP_CURRENT_MY_PROF_MGR_GBL&EC

TEAM GEORGIA CONNECTION
FASTER. FRIENDLIER. EASIER.

TEAM GEORGIA ESS/TEAMWORKS CUSTOMER SERVICE FLEXIBLE BENEFITS

My Employee Self Service TeamWorks Homepage

Thursday, February 25, 2010 7:44 AM Welcome Mary D. Walker My Links Select One: Site Search Sign out

New Window Help

Performance Document - Annual Performance Review

Add Individual Goals/Competencies

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

Title:

Description:
(1325 characters)

Update [Return to Performance Criteria](#)

Done

start Novell GroupWise - M... ePerformance Instruc... Current Documents - ... Registration Confirma... 10:41 AM

Enter the title and the long description for the goal you would like to add. When writing goals ensure they are measurable outcomes that identify results and outcomes expected from the employee including how they will be evaluated.

Click the **Update** button and the will be added to the performance plan.

When working in this section, it is highly recommended you periodically save your data by clicking the save button at the top of the plan.

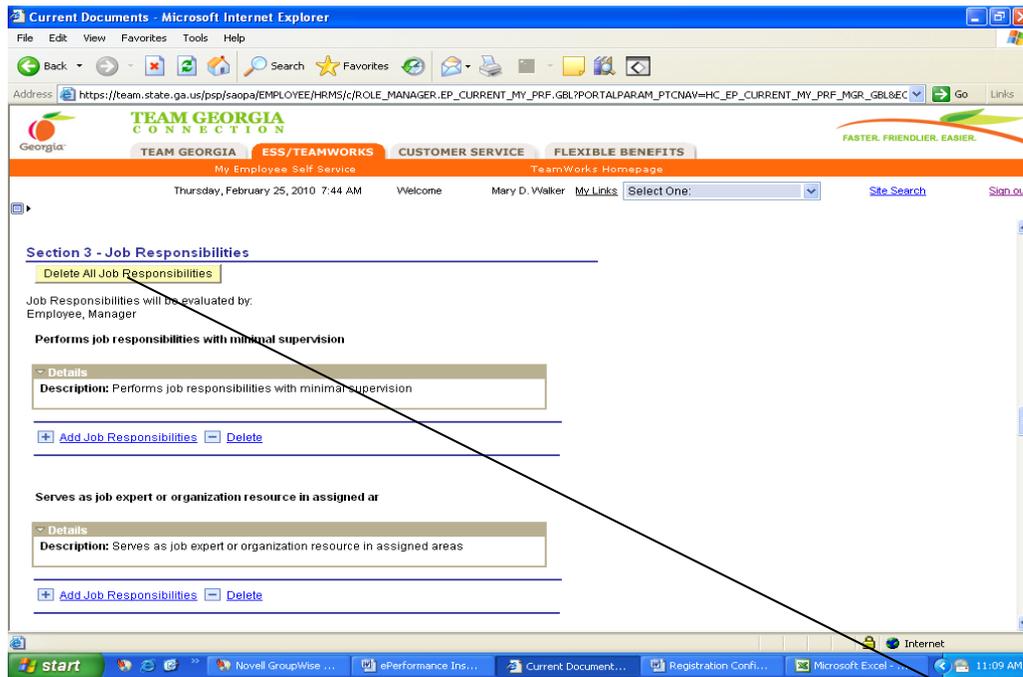
Section 2: Individual Goals/Competencies (continued)

The screenshot shows a web browser window displaying the 'TEAM GEORGIA CONNECTION' portal. The page is titled 'My Employee Self Service' and shows a performance evaluation for 'Mary D. Walker'. The main content area is titled 'Adheres to HIPAA Regulations' and includes a 'Details' section with the following description: 'Description: Has been trained and adheres to established policies on privacy and security requirements for compliance with the Health Insurance Portability and Accountability Act ("HIPAA"), as applicable by Agency policy.' Below the description are two buttons: '+ Add Individual Goals/Competencies' and '- Delete'. A second section, 'Food Stamp Expediated SOP', also has a 'Details' section with the description: 'Description: During the rating period, FI related outcomes will improve by at least 25% of the gap between federally established performance standards and 100%.' and an 'Edit Details' link. At the bottom, a 'Section Summary' section shows 'Section Weight: 50 %'. The browser's address bar shows the URL: 'https://team.state.ga.us/psp/soopa/EMPLOYEE/HRMS/c/ROLE_MANAGER_EP_CURRENT_MY_PRF_GBL?PORTALPARAM_PTCNAV=HC_EP_CURRENT_MY_PRF_MGR_GBL&EC'. The taskbar at the bottom shows the Windows Start button and several open applications including Novell GroupWise, ePerformance Ins..., Current Document..., Registration Conf..., and Microsoft Excel.

The manager can rate Section 2 from 0% to 75% of the performance evaluation (the default is 50%).

Section 3: Job Responsibilities

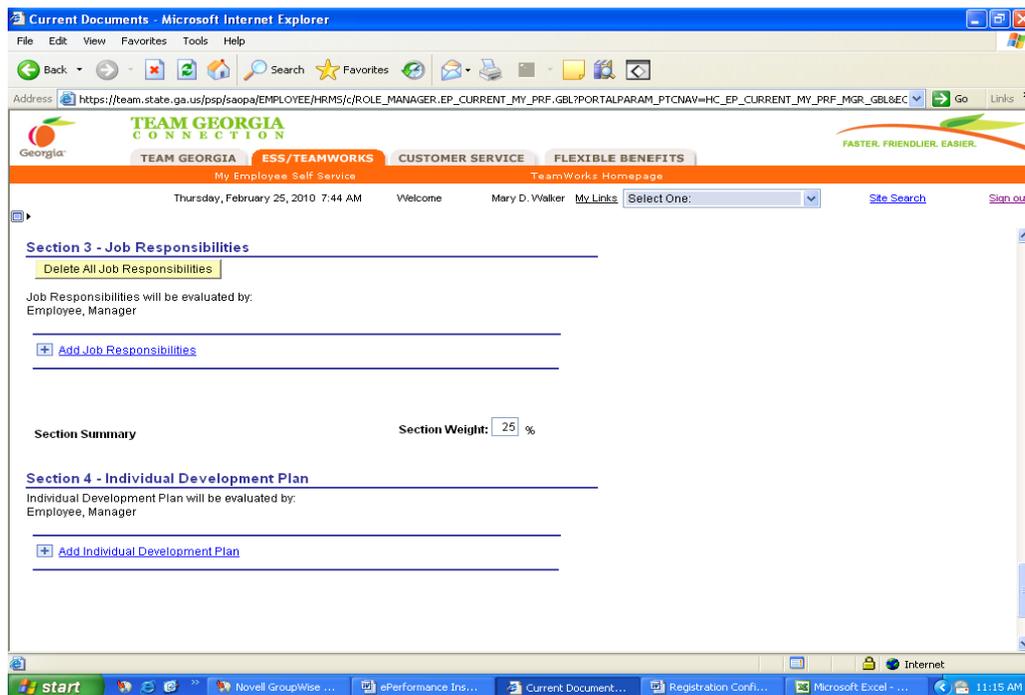
This section is automatically populated with job responsibilities based on the state job description. The purpose of this is to help the manager identify those areas that are most important to the employee's success in the position. Job responsibilities can, and should be deleted from the performance plan as needed. Managers can elect to focus more on goals and/or core competencies than job responsibilities.



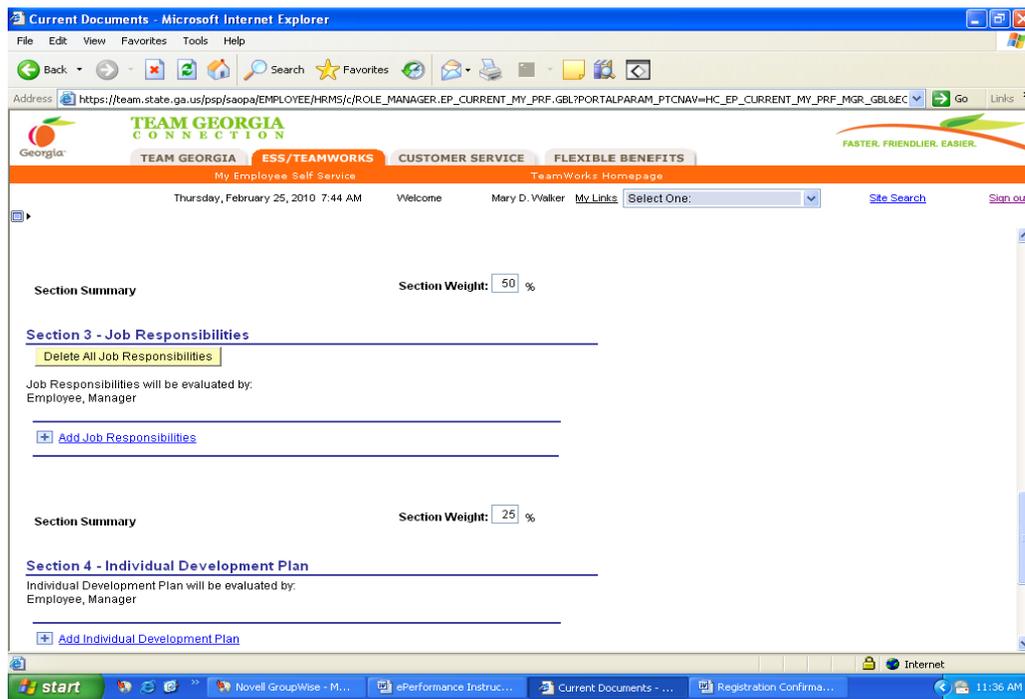
Managers can delete all of the pre-populated job responsibilities by clicking the “**Delete All Job Responsibilities**” button. Similar to Section 2, you have the option delete a specific responsibility by clicking on the (-) **Delete** link.

When working in this section, it is highly recommended you periodically save your data by clicking the save button at the top of the plan.

Section 3: Job Responsibilities (continued)



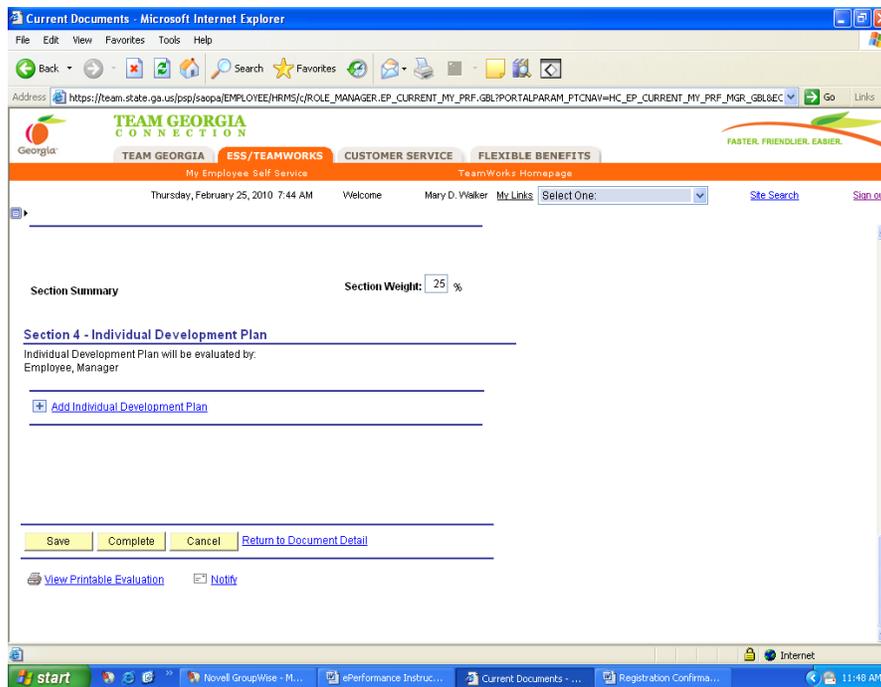
If all of the pre-populated job responsibilities are deleted, you can add your own by following the same process described in Section 2 above. Click the **Add Job Responsibilities** Link. Change the default to **add your own item**; click **next**. Enter a title and a long description. Click **Update** and the responsibility will be added to the plan.



Note: Section 3 defaults to a weight of 25%.

Section 4: Individual Development Plan

An individual development plan should be created by the manager with the employee's input. The plan should identify goals, activities, projects, classes, assignments, and other activities that further contribute to the development of the employee.



Section 4 can be used to focus on several areas:

Development in the current role

- Applies to employees who are new in the job and need developmental activities to help them become a fully successful performer
- Employees who are deficient in their current role (not functioning at the level they need to be in order to be fully successful in their job)

Expand skill set and knowledge areas

- Employees who are fully successful in their current position and could benefit from some special assignments and activities to expand their skill set and move them towards exceptional performance in their current job.

Prepare for future roles

- Developmental activities and goals that will develop an employee for future career opportunities in the Agency or State.

NOTE: This section is not weighted.

Closing Out Planning Phase

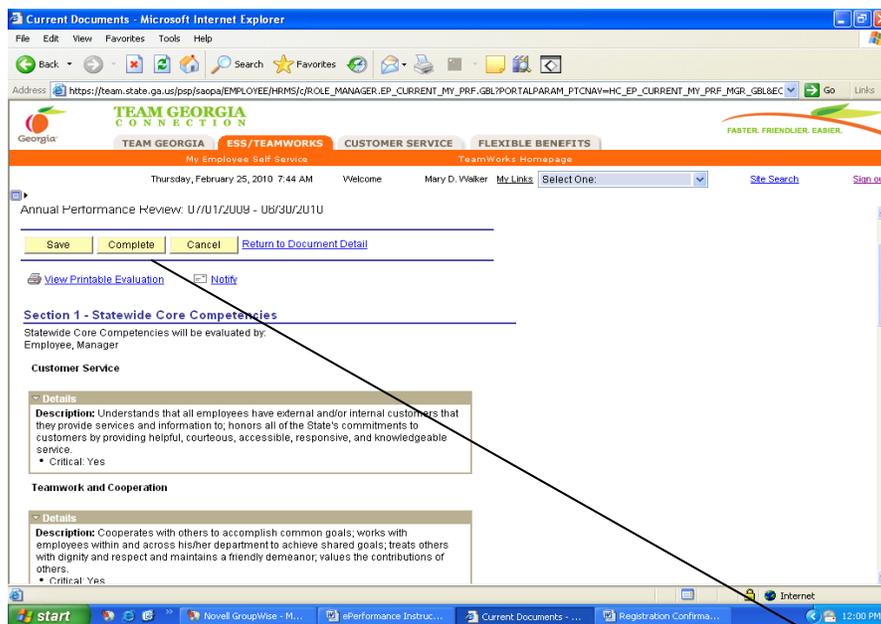
1. Section Weights

After all of the Sections have been established, the manager should review the section weights for Statewide Core Competencies, Individual Goals/Competencies and Job Responsibilities. Each of these sections will be pre-populated with a recommended percentage.

- Section 1 – Statewide Core Competencies – 25% (minimum)
- Section 2 – Individual Goals/Competencies – 50%
- Section 3 – Job Responsibilities – 25%

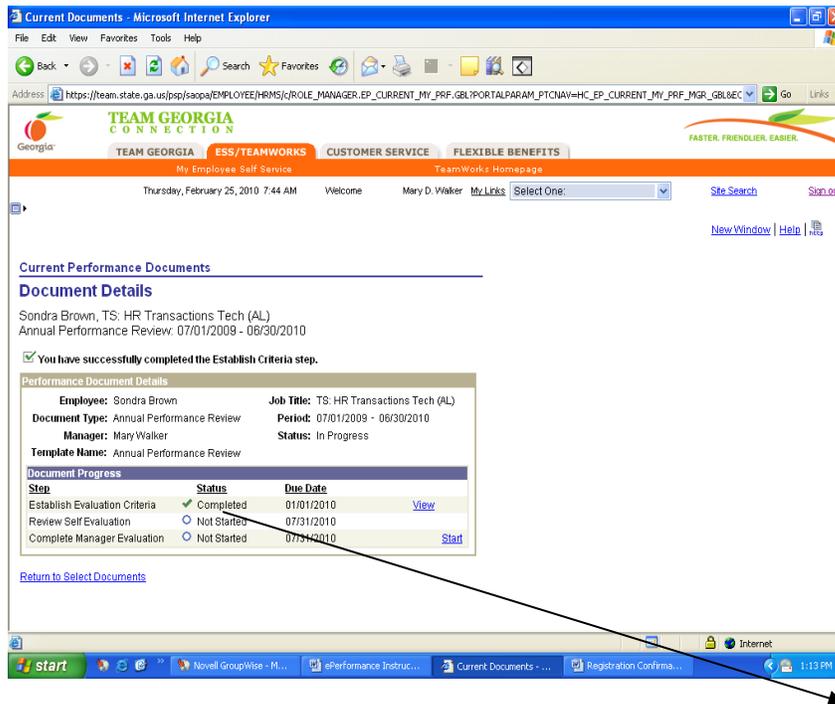
All section weights must add up to 100% before the performance document can be saved.

2. Completing the Plan



The manager completes the “establish criteria” step by clicking the **complete** button. Once the manager has completed this step the document becomes “view only” for the employee and manager.

2. Completing the Plan (continued)



“Establish Evaluation Criteria” box has been checked indicating “Completed”. If the Performance plan was simply saved, then the edit link would remain available.

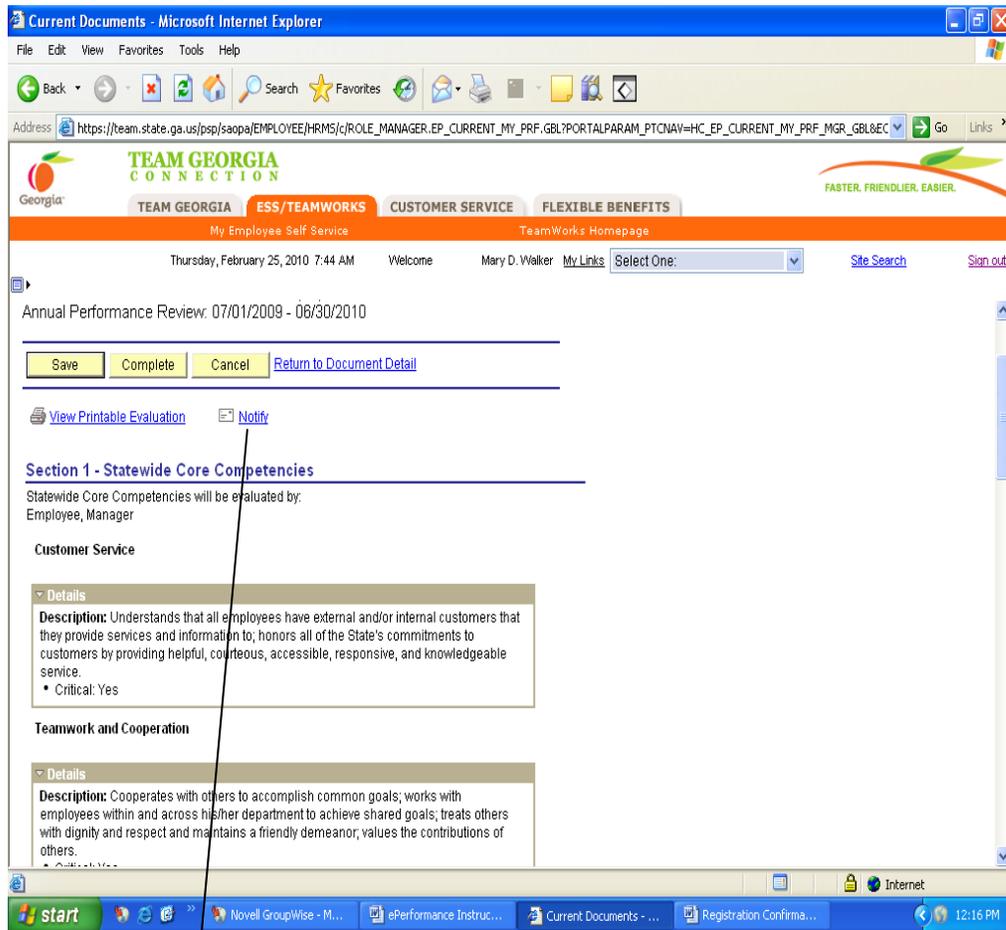
Important Note:

The option to edit the document remains available to the manager provided the next two steps in the process are not started—

- **Employee Self Evaluation**
- **Complete Manager Review**

These steps must not be completed until after June 30, 2010. If either step begins prior to July 1, 2010, the performance plan is locked and no further edits can be made. The manager must recreate the Establish Evaluation Criteria from the beginning.

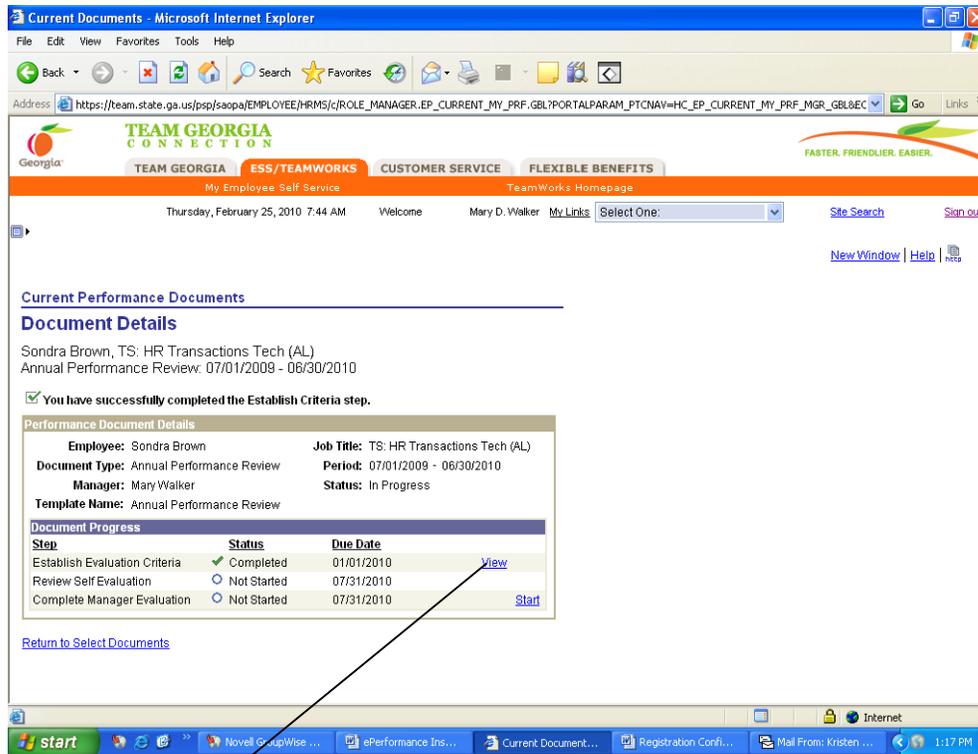
3. Notifying the Employee



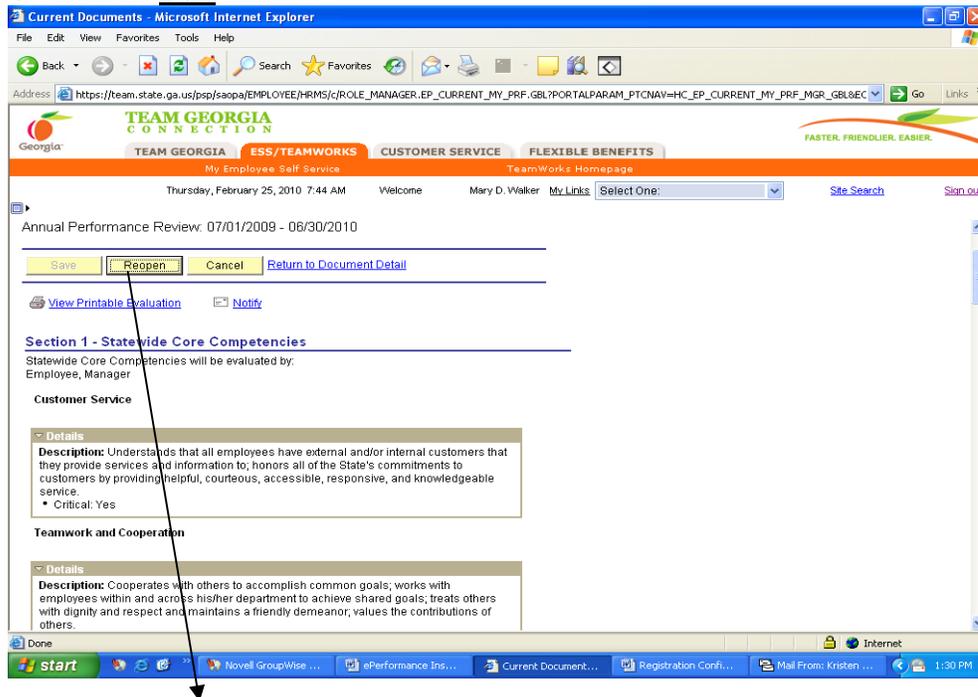
Click on the “**Notify**” link to send an email to the employee informing them the plan is available and to schedule a time to discuss the plan.

NOTE: If the employee’s email address is not listed in PeopleSoft or it is incorrect, you cannot use the Notify feature. The employee should be notified using GroupWise.

4. Reopening a Completed Performance Plan:



Click on the **view** link.

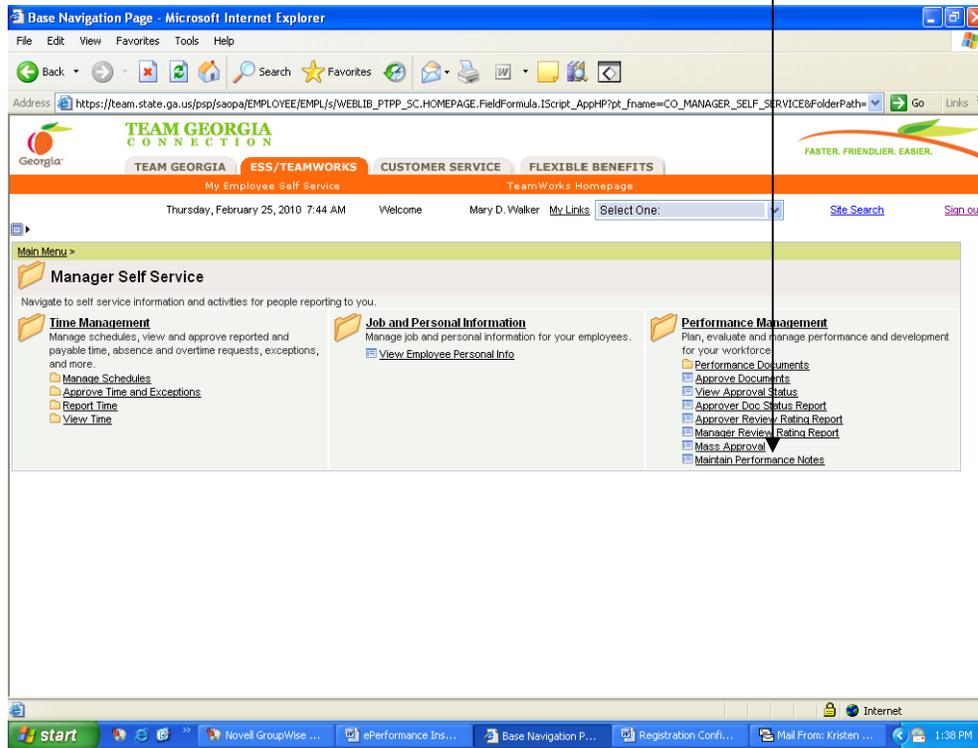


Click on the **“Reopen”** button...if the reopen button is grayed out, the option is not available--you must contact your HR Representative.

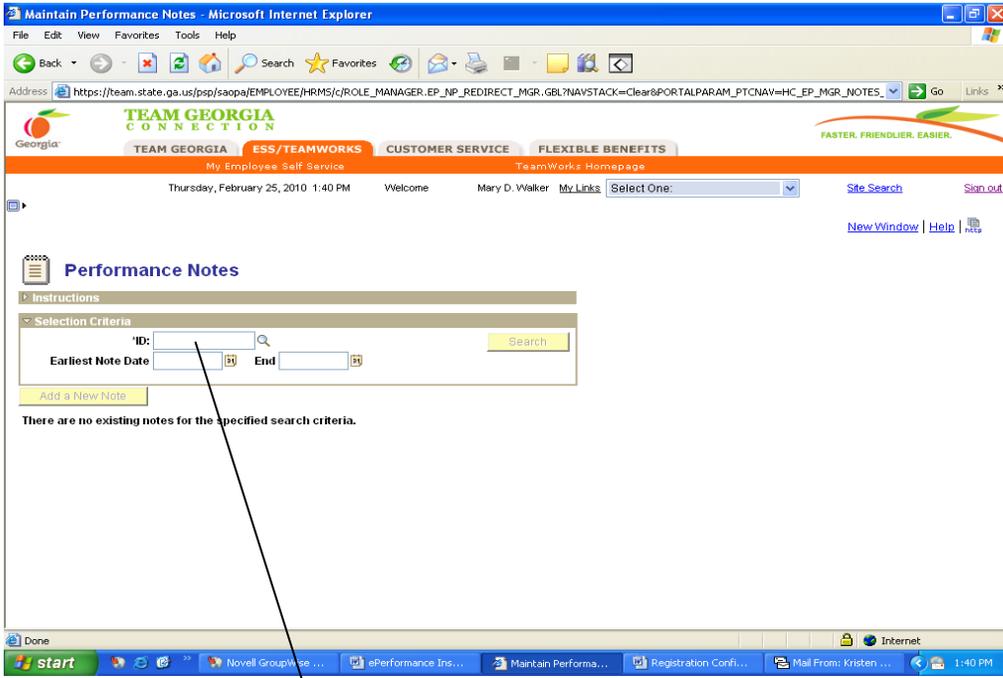
5. Performance Notes

Once the manager and employee have completed the competencies and goals, Performance Notes will be used to allow both the manager and employee to keep track of the progress throughout the performance year. This tool enables both participants of the process to enter progress as it happens, rather than waiting for each review cycle to end. Managers are encouraged to use this feature during performance coaching by recording observed behaviors, two-way feedback and ongoing development.

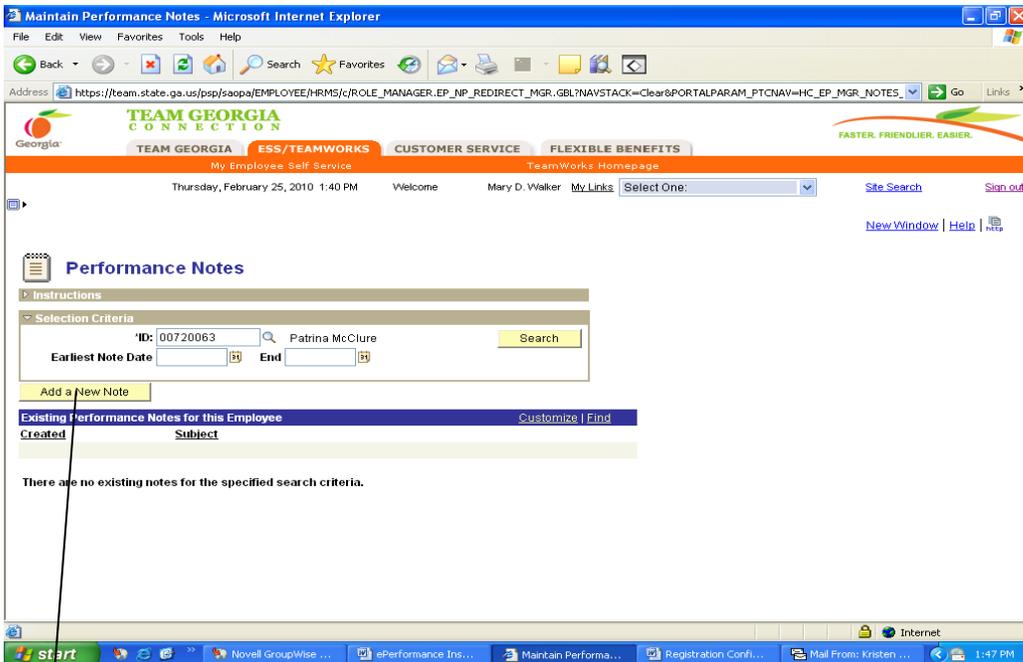
At the Manager Self Service Main Menu Click on **Maintain Performance Notes**



Performance Notes (continued)



Input the employee's ID number. If the ID number is unknown, it can be obtained by accessing Job and Personal Information under Manager Self-Service.



Click the "Add a New Note" button.

Performance Notes (continued)

The screenshot displays a web browser window titled "Maintain Performance Notes - Microsoft Internet Explorer". The address bar shows a URL from the Georgia state portal. The page header includes the "TEAM GEORGIA CONNECTION" logo and navigation tabs for "TEAM GEORGIA", "ESS/TEAMWORKS", "CUSTOMER SERVICE", and "FLEXIBLE BENEFITS". The main content area is titled "Performance Notes - New Note" and contains a form for creating a new performance note. The form includes a "Selected Performance Note" section with the following details:

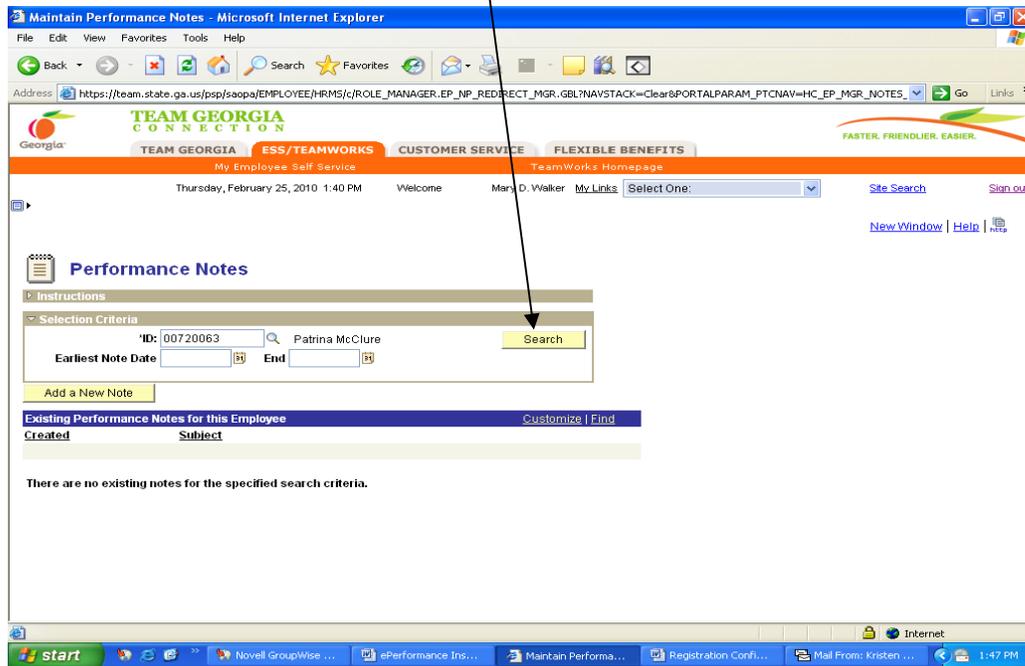
ID: 00720083	Patrina McClure	Created: 02/25/2010 1:49PM
		Creator: Mary Walker
		Updated by:

Below this information are two text input fields: "Subject:" and "Note Text:". A yellow "Save" button is located below the "Note Text" field. At the bottom of the form, there is a "Return To:" link labeled "Performance Note Selection". Two black arrows are overlaid on the image, pointing to the "Subject:" and "Note Text:" input fields respectively.

Enter a Subject, and then enter text in the “**Note Text**” field. Click Save. The performance note for the employee has now been saved and can be referenced in the future.

Performance Notes (continued)

To access historical notes click the “search” button.



Search results will display the list of “created notes” by date, time and subject.

