

PERFORMANCE MANAGEMENT PROGRAM

Frequently Asked Questions

Click to view:

[Manager FAQs](#)

[Employee FAQs](#)

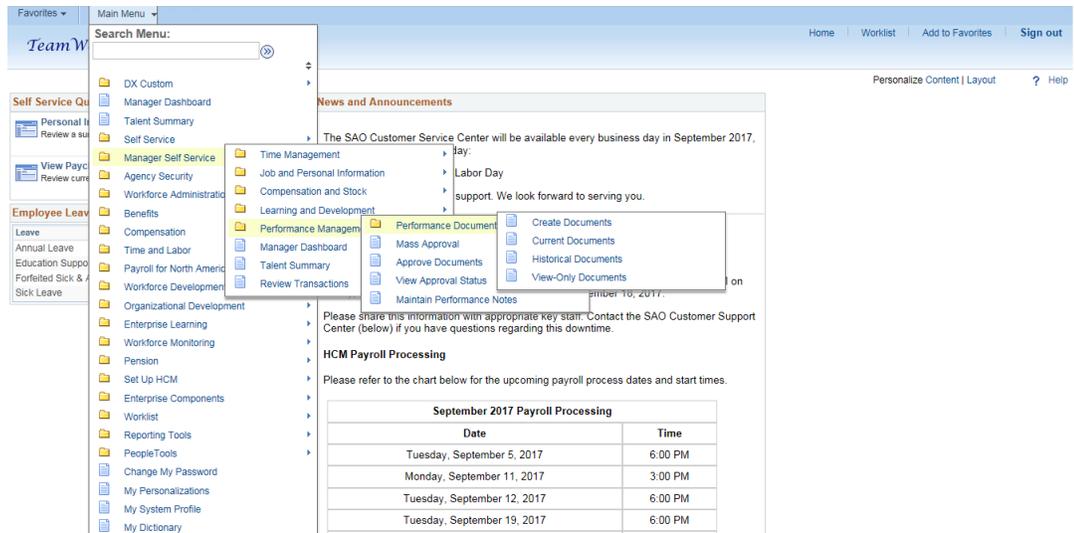
[HR Admin FAQs](#)

Manager FAQs

Q 1. What is ePerformance?

ePerformance is a Web-based self-service performance management application for managers and employees. If your agency uses this tool, you may access ePerformance by logging into the TeamWorks Manager Self-Service portal.

Follow this navigation: Manager Self Service > Performance Management > Performance Documents > Current Documents (to view current documents) or Create Documents (to create new documents).



The screenshot shows the TeamWorks Manager Self-Service portal interface. The left sidebar contains a navigation menu with categories like 'Self Service Quick Links', 'Employee Leave', and 'Organizational Development'. The 'Performance Management' menu item is highlighted, and a sub-menu is displayed with options: 'Performance Document', 'Mass Approval', 'Approve Documents', 'View Approval Status', and 'Maintain Performance Notes'. The 'Performance Document' option is further expanded to show 'Create Documents', 'Current Documents', 'Historical Documents', and 'View-Only Documents'. The main content area displays 'News and Announcements' and 'HCM Payroll Processing' information, including a table for 'September 2017 Payroll Processing'.

September 2017 Payroll Processing	
Date	Time
Tuesday, September 5, 2017	6:00 PM
Monday, September 11, 2017	3:00 PM
Tuesday, September 12, 2017	6:00 PM
Tuesday, September 19, 2017	6:00 PM

Q 2. What is Performance Management?

Performance Management is a process. It is a partnership between the manager and the employee working in a collaboratively manner setting goals, using the organization's mission and goals as the foundation; improving the employee's performance, also increases productivity and the effectiveness of the organization. ([Back to the top](#))

Q 3. I'm having technical difficulties using ePerformance.

Contact your HR Office Admin for assistance or contact DOAS Help Desk at HRA@doas.ga.gov or 404-656-2705 or 1-877-318-2722 ([Back to the top](#))

Q 4. How do I assign ratings to my employee's evaluation?

If you are sure that you have completed all steps prior to providing ratings;
Confirm the following:

- The Define Criteria Step has a green circle (indicating that this step is complete)
- Enter all Manager comments and ratings
- Click "Save" after each entry
- Click the "Submit for Approval" button as the very last step

The screenshot shows the 'Annual Performance Review' interface in HRMS SPP. The 'Steps and Tasks' sidebar on the left shows 'Define Criteria' with a green circle and a red arrow pointing to it, labeled '1. This indicates that the Define Criteria Step is Complete'. The main content area shows 'Manager Evaluation - Update and Submit' with a 'Manager Rating' dropdown menu. A red arrow points to this dropdown, labeled '2. Enter all Manager Ratings'. The 'Save' and 'Submit for Approval' buttons are at the top right. A red arrow points to the 'Save' button, labeled '3. Always click "Save" after each entry.' Another red arrow points to the 'Submit for Approval' button, labeled '4. After completing all rating entries and comments, click "Submit for Approval"'. The interface also shows a 'Communication' section with a description and a 'Manager Comments' text area.

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Q 5. How do I clone a performance document?

To clone a document:

- Follow this navigation: Main Menu > MSS > Performance Management > Performance Document > Create Documents
- Enter the Period Begin Date
- Enter the Period End Date
- Select from the Document Type drop-down (Annual, Mid-Year, or Quarterly Performance Review)
- Clone from Prior Document drop-down (select yes)
- Prior Document – Click the magnifying glass and select the document you would like to clone
- Click Create Documents

- See Status of cloned documents

TeamWorks HRMSPP

Create Performance Documents

Complete the information in the Document Creation Details section below, then select **Create Documents** to generate documents for the employee(s) you previously selected.

Document Creation Details

Period Begin Date: 07/01/2018 Period End Date: 06/30/2019

Document Type: Annual Performance Review

Clone from Prior Document: Yes

Prior Document: 06/30/2016 - Annual Performance

Create Documents

Selected Employees

Employee ID First Name Last Name

Return to Select Employees

TeamWorks HRMSPP

Create Performance Documents - Results

Below are the results for the employees you selected.

Employee ID	Name	Template	Successful Creation?	Status
		Annual Performance Review	Yes	Document created successfully

Go To: [Create Documents](#) | [Current Documents](#)

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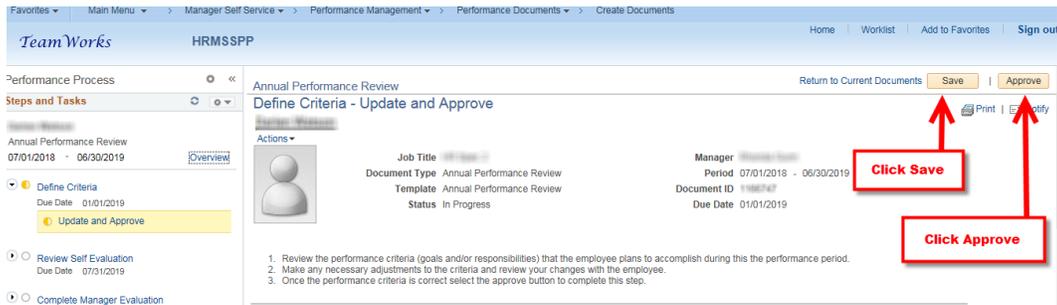
Q 6. How do I edit the weighting, after I have started the “Manager Evaluation” step?

Contact your HR Office for assistance in canceling and deleting the document.

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Q 7. How do I complete the Define Criteria step?

Once you have entered the goals and expectations, click the “Save” button and then click the “Approve” button to close out this step and to proceed.



Step 1: Define Criteria

Update and Approve the Goals entered by the Employee

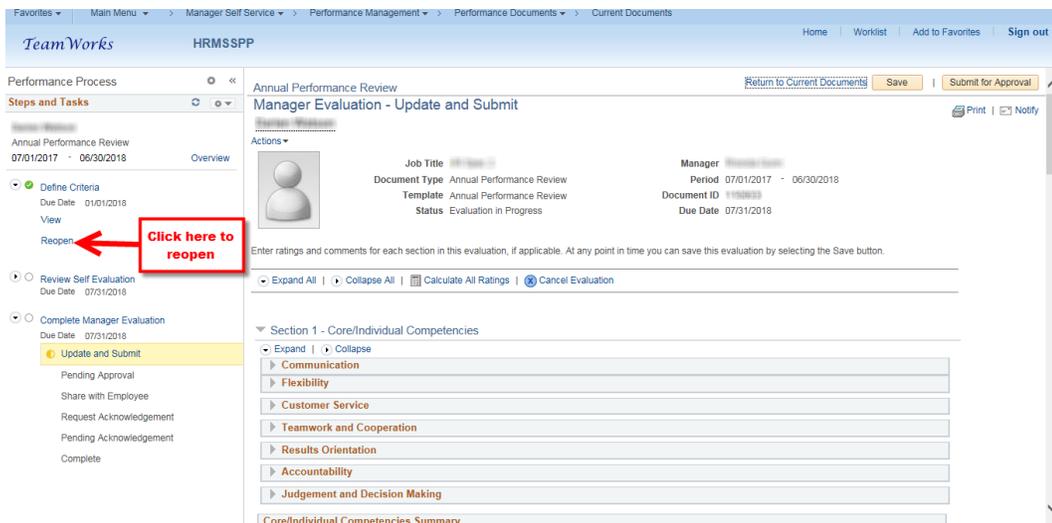
[Hide Details](#)

- During this step the employee should identify the goals that need to be accomplish during the performance period.
- Any core responsibilities or competencies not already defined should be added.
- The manager should review the goals and other performance content.
- When complete, the manager should mark this step approved.

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Q 8. How do I add more job responsibilities, after I have completed the “Define Criteria” step?

Reopen the document by accessing the employee evaluation and clicking the reopen button in the process panel (located to the far left of the screen).

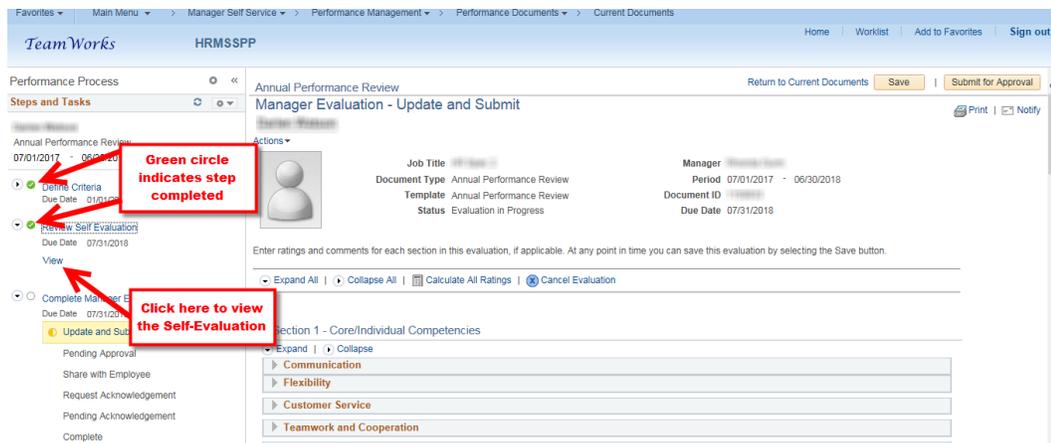


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Q 9. How do I access my employee’s Self Evaluation?

It is important that the Define Criteria step is finalized/approved before the self-evaluation becomes available. Do the following:

- Confirm “Define Criteria” step is complete
- Be sure that the employee has completed the self-evaluation
- Click the “View” button to access the employee’s Self-Evaluation
- Note: Completion of the employee’s Self Evaluation, is not required in order for you to begin the performance evaluation of the employee.



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Q 10. What is the approval progression for Performance Management?

The employee may complete a Self-Evaluation (it is recommended, but not required).

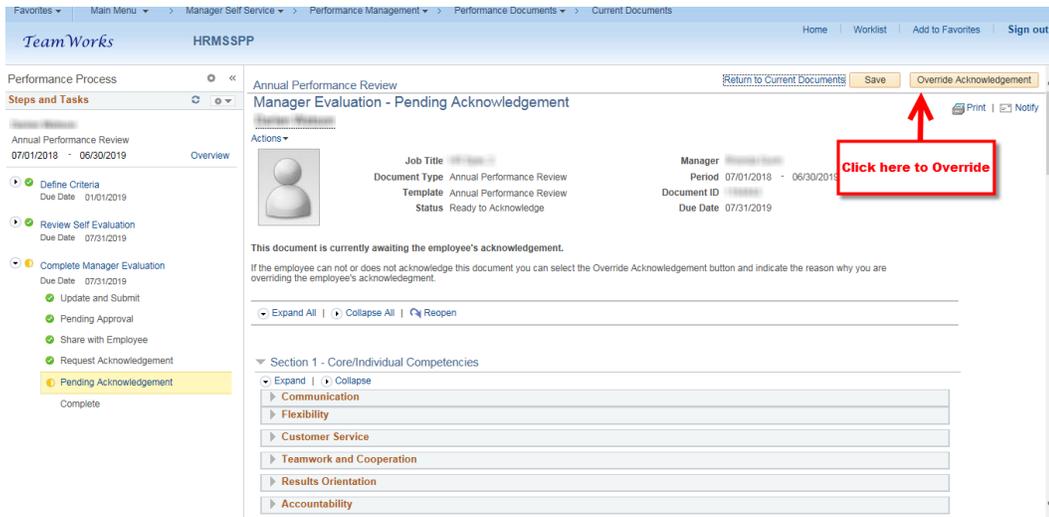
- If applicable, be sure to review the Self-Evaluation.
- Enter ratings and comments for the document and then submit the document to the Reviewing Manager.
- The Reviewing Manager approves the document, and then submits the document to the HR Admin for approval.
- After the approval of the document, it is returned to the Manager for the formal one-on-one discussion with the employee.
- After the one-on-one, both you and the employee acknowledges the document.
- This closes out the document for this performance year. [\(Back to the top\)](#)

Q 11. Why can't I access the performance document?

Immediate access is granted to the performance document, once HR provides their approval of the document. [\(Back to the top\)](#)

Q 12. What do I do if the employee does not want to acknowledge the document?

In the event the employee is unavailable or declines to acknowledge the document, click the **Override Acknowledgement** button to acknowledge the reviewed document.



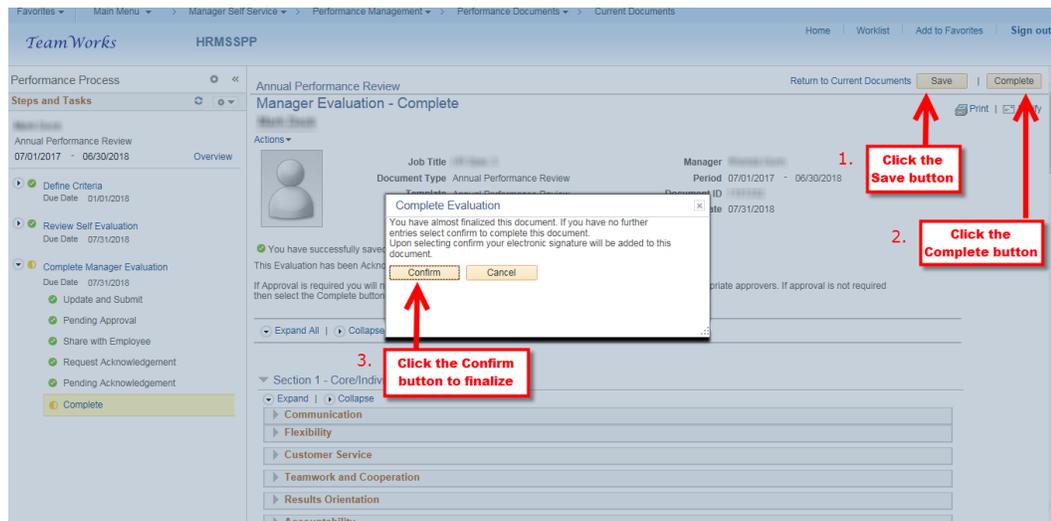
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Q 13. How do I close out the performance document?

After all of the approvals, and the employee has acknowledged the document,

- Click the "Save" button
- Click the "Complete" button to close out the document.

- Click the “Confirm” button to finalize the document



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Q 14. What is the time-frame for completing Performance Documents?

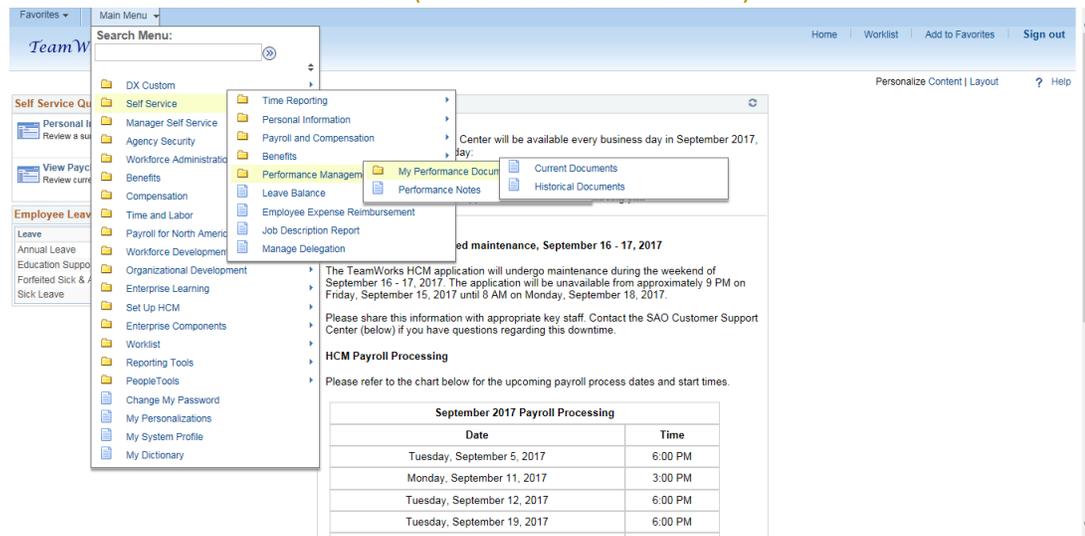
For the State of Georgia, it is recommended that agencies use the fiscal year as their guide. Managers would begin establishing their Performance Plans at the beginning of July, and the performance period would continue through June 30. July 1 thru June 30 would be considered an annual evaluation. [\(Back to the top\)](#)

Employee FAQs

Q 15. What is ePerformance?

ePerformance is a Web-based self-service performance management application for managers and employees. If your agency uses this tool, you may access ePerformance by logging into the TeamWorks Self-Service portal.

Follow this navigation: Self-Service > Performance Management > My Performance Documents > Current Documents (to view current documents)



The screenshot shows the TeamWorks Self-Service portal interface. The left sidebar contains a 'Main Menu' with categories like 'Self Service', 'Employee Leave', and 'Worklist'. The 'Self Service' menu is expanded, showing sub-items such as 'Time Reporting', 'Personal Information', 'Payroll and Compensation', 'Benefits', 'Performance Management', 'Leave Balance', 'Employee Expense Reimbursement', 'Job Description Report', and 'Manage Delegation'. The 'Performance Management' sub-item is selected, and a dropdown menu is visible with options for 'My Performance Documents', 'Performance Notes', 'Current Documents', and 'Historical Documents'. The 'Current Documents' option is highlighted. The main content area displays a message about system maintenance on September 16-17, 2017, and a section for 'September 2017 Payroll Processing' with a table of dates and times.

September 2017 Payroll Processing	
Date	Time
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Q 16. What is Performance Management?

Performance Management is a process. It is a partnership between the manager and the employee working in a collaboratively manner setting goals, using the organization's mission and goals as the foundation; improving the employee's performance, also increases productivity and the effectiveness of the organization. [\(Back to the top\)](#)

Q 17. I'm having technical difficulties using ePerformance.

Contact your manager for assistance or your HR Office Admin. [\(Back to the top\)](#)

Q 18. What's the value for me, as an employee, to be involved in the Performance Management process?

Without you, the Performance Management process does not work. Performance Management is a process that involves your participation. You will also gain a better understanding of the bigger picture, and how your goals align with those of the department and that of the agency. [\(Back to the top\)](#)

Q 19. What is "on-going feedback"?

The State Personnel Board Rules require managers to perform interim check-ins with their employees. This can consist of simply checking on the status of a project you may be working on. It may be providing you with direction in the event you may have stalled or have reached a road block. It may be feedback concerning a job well done. Your goal is to succeed, and the manager's goal is to assist in providing the necessary tools and resources you may need to accomplish that goal. Remember, your goals are aligned with that of the department, and that of the agency's. ([Back to the top](#))

Q 20. What is an IDP/Individual Development Plan?

An IDP/Individual Development Plan is a document whose main purpose is to develop or improve an employee's performance. The document consists of goals and tasks. An IDP is for employees who are looking to improve upon existing skills in their current role, as well as for those employees who are seeking to develop new skills for future opportunities. It's a document that can be updated regularly, or as needed. ([Back to the top](#))

Q 21. What can an IDP do for me?

Even if you're not interested in moving into another position, having an IDP can assist in increasing your knowledge concerning your current role. Bear in mind, job requirements and employment needs are constantly changing, and it is always a good idea to develop new skills or simply keep your existing skills relevant. ([Back to the top](#))

Q 22. Is an IDP rated on my performance evaluation?

No. IDPs are focused on the employee's growth and development. Discussions may occur between you and your manager regarding the progress of your IDP, but once again, it is not rated. ([Back to the top](#))

Q 23. Who creates this Individual Development Plan?

The plan is created in a partnership between the you and your manager. Both have a joint responsibility regarding its creation, but you are the driver of the plan. You will stand to benefit the most from having an IDP; therefore, your overall involvement is critical.

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Q 24. If an IDP is added to my Performance Plan, is it permanent?

Individual Development Plans (IDP) are subject to modifications. Bear in mind, the IDP is about your growth and overall improvement. If it needs modifying, then be sure that you and your manager work together to amend it as necessary. If the needs of the agency change, this too can alter the direction of the IDP. ([Back to the top](#))

Q 25. How do I acknowledge the document?

After the formal one-on-one meeting with your manager,

- click the "Acknowledge" button in ePerformance to confirm the completion of this process.

TeamWorks HRMSSPP

Performance Process << Annual Performance Review

Steps and Tasks: Annual Performance Review (07/01/2018 - 06/30/2019) Overview

- Define Criteria (Due Date: 01/01/2019)
- Complete Self Evaluation (Due Date: 07/31/2019)
- Review Manager Evaluation (Due Date: 07/31/2019)
 - Review with Manager
 - Acknowledge**

Manager Evaluation - Acknowledge

Job Title: [Redacted] | Manager: [Redacted]

Document Type: Annual Performance Review | Period: 07/01/2018 - 06/30/2019

Template: Annual Performance Review | Document ID: [Redacted]

Status: Ready to Acknowledge | Due Date: 07/31/2019

Buttons: Save, Acknowledge, Print, Notify

Text: This document is currently waiting for your acknowledgment. Select the Acknowledge button to confirm that you and your manager have discussed this document. Your name will be placed in the signature section on the printed document acknowledging that the review was held.

Section 1 - Core/Individual Competencies

- Click the "Confirm" button to complete the acknowledgement

TeamWorks HRMSSPP

Performance Process << Annual Performance Review

Steps and Tasks: Annual Performance Review (07/01/2017 - 06/30/2018) Overview

- Define Criteria (Due Date: 01/01/2018)
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 - Review with Manager
 - Acknowledge**

Manager Evaluation - Acknowledge

Job Title: [Redacted] | Manager: [Redacted]

Document Type: Annual Performance Review | Period: 07/01/2017 - 06/30/2018

Template: Annual Performance Review | Document ID: [Redacted]

Status: Ready to Acknowledge | Due Date: 07/31/2018

Buttons: Save, Acknowledge, Print, Notify

Text: You have successfully saved. This document is currently waiting for your acknowledgment. Select the Acknowledge button to confirm that you and your manager have discussed this document. Your name will be placed in the signature section on the printed document acknowledging that the review was held and your electronic signature will be added to this document.

Dialog Box: Confirm Review Action

Text: You have chosen to acknowledge that you and your manager have reviewed this document. Upon selecting confirm you are acknowledging that the review was held and your electronic signature will be added to this document.

Buttons: Confirm, Cancel

Section 1 - Core/Individual Competencies

- Communication
- Flexibility
- Customer Service
- Teamwork and Cooperation
- Results Orientation
- Accountability

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HR Admin FAQs

Q 26. What is ePerformance?

ePerformance is a Web-based self-service performance management application for managers and employees. If your agency uses this tool, you may access ePerformance by logging into the TeamWorks portal in Workforce Development.

Follow this navigation: Workforce Development > Performance Management > Performance Documents or Approve Documents > Create Documents (to create new documents)

The screenshot shows the TeamWorks HCM application interface. The left sidebar contains a navigation menu with categories like Self Service, Employee Leave, and Workforce Development. The 'Performance Management' folder is expanded, showing sub-items like Performance Document, Reports, View Document Creation, Approve Documents, and HR Admin Doc. Status Report. The 'Performance Document' folder is further expanded, showing 'Create Documents' and 'View Documents'. The main content area displays 'News and Announcements' with a table of scheduled maintenance dates and times.

Date	Time
Tuesday, September 5, 2017	6:00 PM
Monday, September 11, 2017	3:00 PM
Tuesday, September 12, 2017	6:00 PM
Tuesday, September 19, 2017	6:00 PM

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Q 27. What is Performance Management?

Performance Management is a process. It is a partnership between the manager and the employee working in a collaboratively manner setting goals, using the organization's mission and goals as the foundation; improving the employee's performance, also increases productivity and the effectiveness of the organization. [\(Back to the top\)](#)

Q 28. I'm having difficulties using ePerformance.

Contact the DOAS Help Desk at HRA@doas.ga.gov or 404-656-2705 or 1-877-318-2722.

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Q 29. In an attempt to mass create my documents, some of the documents were missing.

This may occur when the "Reports to" information is not up-to-date within the system. Check the following:

- Make sure the "Reports to" relationship beginning with the employee → manager → reviewing manager is correct in job data as well as in position data.

- Be sure to do this before attempting to mass create performance documents.
- For information on how to update the “Reports to” in PeopleSoft, contact the SAO Helpdesk at 404.657.3956 or HCM@sao.ga.gov . [\(Back to the top\)](#)

Q 30. I cannot view the Performance document.

The document cannot be viewed until the manager and the employee have begun the document. [\(Back to the top\)](#)

Q 31. How do I approve the document?

To Approve Performance Documents, do the following:

- In Team Works follow this navigation: Main Menu > Workforce Development > Performance Management > Approve Documents
- After reviewing the document/s, you will have the option to either approve it (Click the “Approve” button) or send it back to management for modifications (Click the “Deny” button).

The screenshot displays a 'Performance Document' with the following details: Doc Type: Annual Performance Review; Author: [redacted]; Period Begin Date: 07/01/2018; Period End Date: 06/30/2019; Rating: 3-Successful Performer. Below this is the 'Evaluation Approval Chain' section, which shows a flow from 'Approved' (ePerformance Approving Mgr, 08/11/17 - 3:03 PM) to 'Skipped' (08/11/17 - 3:03 PM) and 'Pending' (1 HR Approval Required, EP HR Admin). A red box with the text 'Click here to Approve' and a red arrow points to the 'Approve' button at the bottom of the interface.

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Q 32. How do I cancel an evaluation? A manager needs to edit the weighting.

To edit the weighting after the manager has begun the “Manager Evaluation” step, the following is necessary:

- Access the document, scroll to the bottom and click “cancel evaluation.”
- Access the document again, scroll to the bottom and click “delete evaluation.”

- Once this is done, if the employee has completed the self-evaluation, it is necessary that the you perform the same steps to cancel/delete the self-evaluation.
- Make sure to access the document by selecting the appropriate employee, clicking view beside the “define criteria” step to access the document and then click the reopen button (located to the left of the screen) to edit the weighting.

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