

Creating Performance Plans using ePerformance Checkpoint template-Job Aid for Managers

~ Home					
Approvals		Announcements			
		October 2023 Payroll Processing Schedule			
0		0 Unread			

After HR Administrators have created the documents for the current fiscal year (or the manager has cloned their direct reports performance plans for the current fiscal year) the employee, and their manager, all have an active role during the performance planning process.

This document includes the steps that managers should follow to complete goal setting and the Define Criteria Step when creating performance plans.

- 1. Log into *Team Works* using your assigned credentials.
- 2. Navigate to Main Menu > Manager Self Service > Team Performance > Current

Documents.

	✓ Manage	er Sel	f Service
Approvals	My Team		Employ
			Ę
0			
Team Performance	View Compensation History		
3 In Progress Documents			

3. Once you have clicked on the Team Performance tab, you should then see all listed team members under current documents.

Note: All of the manager's direct reports documents should be listed. If you do not see all of your direct reports, contact your agency's HR Administrator.



- When starting your plans, be sure to choose the link for the appropriate begin/end dates.
- You may also use the filter option to search the employee-by-Employee ID, Name, or filter by Document status, Group ID, or Period dates.

	Team Performance			
Current Documents				Create Docume
T	Document Type	Document Status	Period Begin / Period	Next Due Date
HR Spec 2	Annual Performance Review	Define Criteria	05/01/2023 04/30/2024	06/20/2023
HR Spec 2	Annual Performance Review	Define Criteria	05/01/2023 04/30/2024	06/20/2023
Marketing Spec 2	Annual Performance Review	Define Criteria	05/01/2023 04/30/2024	06/20/2023

- 4. The employees document should show as below.
 - Notice the Steps and Task panel which alerts the Manager as to which steps needs to be completed.
 - > The Save and Approve button will be located in the top right-hand corner of the performance review screen.

Performance Process	* «	
Steps and Tasks	•	Annual Performance Review
Dedre Brown Annual Performance Review 05/01/2023 04/30/2024 Ove	erview	Define Criteria - Update and Approve Dedre Brown Actions* Hate Title - Up Sees 6 Hate Title
Define Criteria Due Date 06/20/2023 Update and Approve		Joo Inte HK Spc 2 Imanager Document Type Annual Performance Review Period 05/101/2023 - 04/30/2024 Template EMP Performance Review Document ID 1514231 Status In Progress Due Date 06/20/2023
O Checkpoint 1 Due Date 004/2023 O Checkpoint 2 Due Date 1102/2023 O Finalize Criteria Due Date 012/1024 O Review Self Evaluation Due Date 05/21/224		1. Review the performance criteria (goals and/or responsibilities) that the employee plans to accomplish during this the performance period. 2. Make any necessary adjustments to the criteria and review your changes with the employee. 3. Once the performance criteria is correct select the approve button to complete this step. C. Expand All ① Collapse All P. Section 1 - Core/Individual Competencies
O Complete Manager Evaluation Due Date 05/31/2024		 Section 2 - Individual Goals Section 3 - Individual Development Plan
		Audit History

Define Criteria (Goal Setting)

During these steps you will:

1. Define the performance criteria (goals and/or responsibilities) that the employee will be evaluated on during this performance period.



- 2. Make any necessary adjustments to the criteria and review your changes with the employee.
- 3. Once the performance criteria are established, select the approve button to complete this step.

Section 1: Core/Individual Competencies

The Statewide Core Competencies are pre-populated for all employees. Based on the employee's role and additional competencies would have to be added to this section.

There are *five* Statewide Core Competencies for all employees:

- > Customer Service
- > Accountability
- > Teamwork and Cooperation
- Results Orientation
- > Judgement and Decision

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

- > 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 1 along with the additional competencies.

1. Click the Expand All link to view the details of each Core/Individual Competency.

Georgia	_
Department of Administrative Services	

Performance Process	• «	Annual Performance Review	
iteps and Tasks	0 0 -	Define Criteria - Update and Approve	
Antonio Cummings		Section 1 - Core/Individual Competencies	
Annual Performance Review 07/01/2021 - 06/30/2022	Overview	Core/Individual Competencies will be evaluated by: Employee, Manager 	
P Define Criteria		Customer Service	
Due Date 08/30/2021		Description : Understands that all employees have external and/or internal customers that they provide services and	
Update and Approve		and knowledgeable service.	
Checkpoint 1			
Due Date 00/20/2021		Created By Template 10/14/2021 2:63PM	
Checkpoint 2		Teamwork and Cooperation	
Due Date 12/30/2021 Finalize Criteria Due Date 02/21/2022		Description: Cooperates with others to accomplish common goals; works with employees within and across his/her department to achieve shared goals; treats others with dignity and respect and maintains a friendly demaanor, values the contributions of others.	
Review Self Evaluation Due Date 05/31/2022		Created By Template 10/14/2021 2:53PM	
Complete Manager Evaluation		Results Orientation	
Due Date 08/20/2022		Description : Consistently delivers required business results, sets and achieves achievable, yet appressive, goals; consistently complies with quality standards and meets deadlines; maintains focus on Agency and State goals.	
		Created By Template 10/14/2021 2:63PM	
		* Accountability	
		Description. Accepts full responsibility for and and particulation as a learn member, displays honesty and hufshubness of the second second demonstrates a constitution to develop on hubble public duty and presenting oneself as a creditive representative of the Agency and blate to maximum the public's trust.	
		Created By Templates 10/14/2021 2.53PM	
		Judgement and Decision Making	
		Description: Analyzes problems by evaluating evaluatine information and resources, develops effective, viable solutions to problems that can help drive the effectiveness of the department and/or State of Georgia.	
		Created By Template 10/14/2021 2-53PM	
		Core/Individual Competencies Summary	
		Section Weight 25 % (not less than 25%)	

*Things to Remember:

- > The 5 Statewide Core Competencies cannot be changed.
- Inside each competency column managers may add "Performance Note" (including attaching supporting documents) throughout the performance period (this makes for easier ratings).
- If additional competencies need to be added to the performance document, click on the "Add Item" link. If you know the Competency you would like to add to the performance document, type it in the "Title" field. To see a complete listing of the Behavioral Competencies that can be added to thedocument, click on the "Search" button. Select the additional competencies to be added and click the "Save" button.
- The additional Competencies will now appear at the bottom of the first 5 competencies. You will also see your name listed by "Created by" as the person who added the competencies to the performance document.
- The additional Competencies will now appear at the bottom of the first 5 competencies. You will also see your name listed by "Created by" as the person who added the competencies to the performance document.

2. Scroll down to the bottom of **Section 1** and change the weighting based on your agency's policy.

Corennatividual Competencies Summary
Section Weight 25 % (not less than 25%)

*Note: Section 1-Core/Individual Competencies cannot be given a weight less than 25%



Section 2: Individual Goals:

This section is not pre-populated. The manager must add their own goals for each employee based on the employee's role and job description.

When working in this section, it is highly recommended that you do the following:

- Type all goals and save them to a word document. You can then copy/paste them into the system.
- Save your data often by clicking the "Save" button at the top of the plan.
- 1. Add your goal(s). Click on the "Add item" link.

Performance Process	«							
iteps and Tasks	Annual Pe	erformance Review						
Degre Drown	Define	Criteria - Update and Ap	prove					
Annual Performance Review	Actions -	own						
05/01/2023 04/30/2024 Overview	~	Job Title	HR Spec 2		Manager	Same		
Define Criteria		Document Type	Annual Perfor	mance Review	Period	05/01/2023 -	04/30/2024	
Due Date 06/20/2023		Template	EMP Perform	ance Rev Doc-403	Document ID	1514231		
Update and Approve		Status	In Progress		Due Date	06/20/2023		
• Checkpoint 1								
Due Date 08/04/2023	1. Revie	ew the performance criteria (goals	and/or responsi	bilities) that the employee plan	is to accomplish during this	the performance	e period.	
Checkpoint 2 Due Date 11/02/2023	2. Make 3. Once	e any necessary adjustments to the the performance criteria is correct	e criteria and rev t select the app	view your changes with the em rove button to complete this ste	ployee. ep.			
Due Date 01/31/2024	 Expand 	I All	and Section					
Review Self Evaluation Due Date 05/31/2024	▶ Secti	on 1 - Core/Individual Co	mpetencies					
Complete Manager Evaluation Due Date 05/31/2024								
	 Sect 	ion 2 - Individual Goals						
	Individu	al Goals will be evaluated by: Emp	loyee, Manager					
	🛃 Add	Item						
	▼ Ind	ividual Goals Summary						
		0						
		Section Weig	int 60 %	(not less than 60%)				
2.								
Performance Process	🏶 «	Annual Performan	ce Reviev	N				
Stone and Tasks			001101101					
Steps and Tasks	G	Add Your Own Ite	em					
			A 100 - 1					
Appual Performance Poview			^ litle					
	Overview	D	escription					P
05/01/2023 04/30/2024	Overview			29 🖘 A Font	- Size - B	IU¦≣	:≡ <u>A</u> • <u>M</u> • ⊞	- 🖻
Define Criteria								
Due Date 00/20/2023								
Update and Approve								
Checkpoint 1								
Due Date 08/04/2023								
• Checkpoint 2								
Due Date 11/02/2023		Add						

3. In the "Title" field, type in the goal title or description. Be sure to provide description information and click "Add". This will save the information that you just added for individual goals.



- SMART goals are recommended as they ensure there are measurable outcomes that identify results and outcomes expected from the employee including how they will be evaluated.
- Start and end dates can be added inside the description box if a goal has a specific time frame tied to it.
- Repeat the same steps if you like to add more goals in this area.
- Managers can go back into "Section 2" to edit or delete at any time. If you have completed the task, you then want to "Save" all work. The save button is in the upper right-hand corner of the screen.

▼ Humans Resources Performance Management Specialist					
Description : Performance Training, Conduct quarterly training, etc.					
Created By Crean Lookies Last Modified By Crean Lookies	11/03/2023 11:27AM 11/03/2023 11:29AM				

4. Scroll down to the bottom of Section 2 and change the weightings based on your agency policy.

Section Weight 60 (not less than 60%)	Individual Goals Summary
	Section Weight 60 % (not less than 60%)

Section 3: Individual Development Plan (IDP)

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 3 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 helpthem 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.

Reminders:

- Managers can add development goals the same way you add goals in Section 2.
- This section is not weighed and will not be evaluated.
- 1. Click "Add Item".

ndividual Development Plan Add Item	will be evaluated by: Employee, Manager
Annual Performance R	
Add Your Own Iter	n
	*Title
Description	State Font - Stze - B I U III III A- O- III

- 2. If you are finished with the document, click "Save" in the top right-hand corner.
- 3. Next Click "Update and Approve" located in the Steps and Tasks panel.



9. Approve the performance document by selecting "Confirm".





10. Verify the "Define Criteria" turns green.



Once the manager has completed this step, the manager will need to click the share with employee button. This in turn will notify the employee that their ready to review the plan. The document becomes "view only for the employee and manager.

11. Return to "Current Performance Documents". Document Status should change form "Define Criteria" to "Track Progress-Checkpoint 1".

Current Documents				Create Docur	nents
Ţ					3 row
Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date	
HR Spec 2	Annual Performance Review	Track Progress - Checkpoint 1	05/01/2023 04/30/2024	08/04/2023	>
HR Spec 2	Annual Performance Review	Define Criteria	05/01/2023 04/30/2024	06/20/2023	>
Marketing Spec 2	Annual Performance Review	Define Criteria	05/01/2023 04/30/2024	06/20/2023	>

12. END OF STEPS