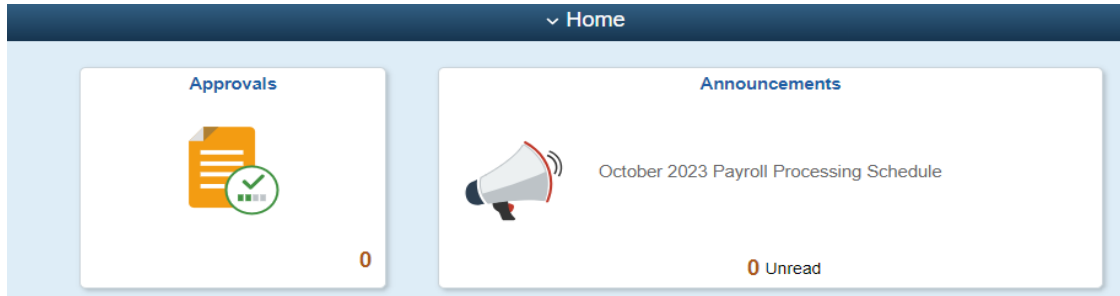# Creating Performance Plans using ePerformance Checkpoint template-Job Aid for Managers

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.

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.

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.

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:
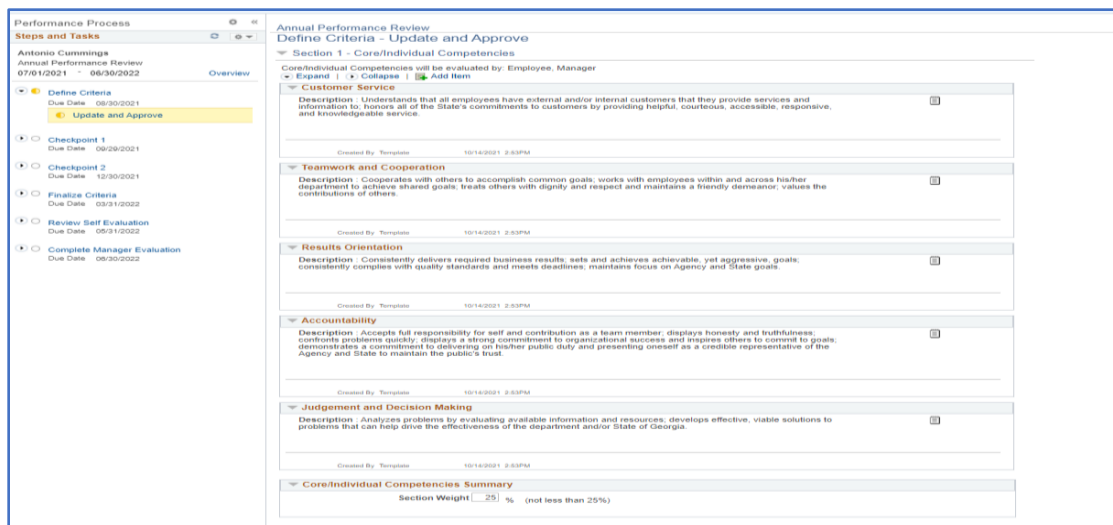
➢ *Customer Service*

➢ *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.

<p style="text-align:center">*Things to Remember:</p>

- The 5 Statewide Core Competencies cannot be changed.

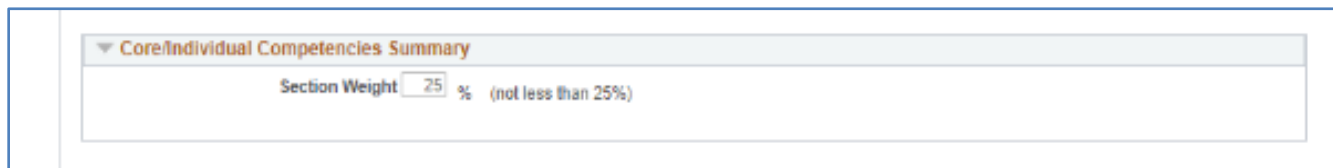- Inside each competency column managers may add "Performance Note" (including attaching supporting documents) throughout the performance period (this makes for easier ratings).

- 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 tothe 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 tothe performance document.

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

***Note:** Section 1-Core/Individual Competencies cannot be given a weight less than 25%
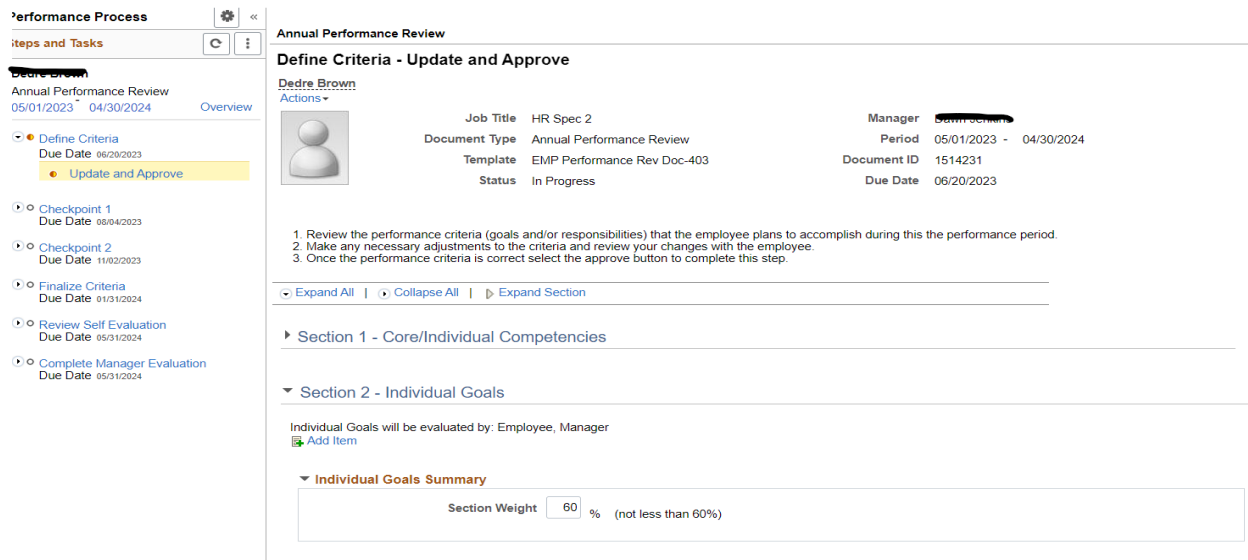
Section 2: Individual Goals:

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.

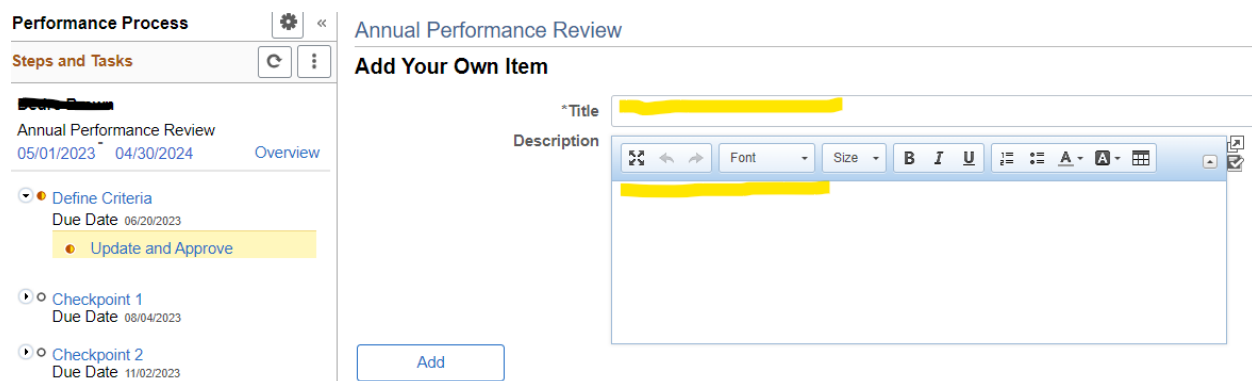When working in this section, it is highly recommended that you do the following:

➢ 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.

2.

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	~~Sean Jenkins~~	11/03/2023 11:27AM
Last Modified By	~~Sean Jenkins~~	11/03/2023 11:29AM

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

▼ 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:
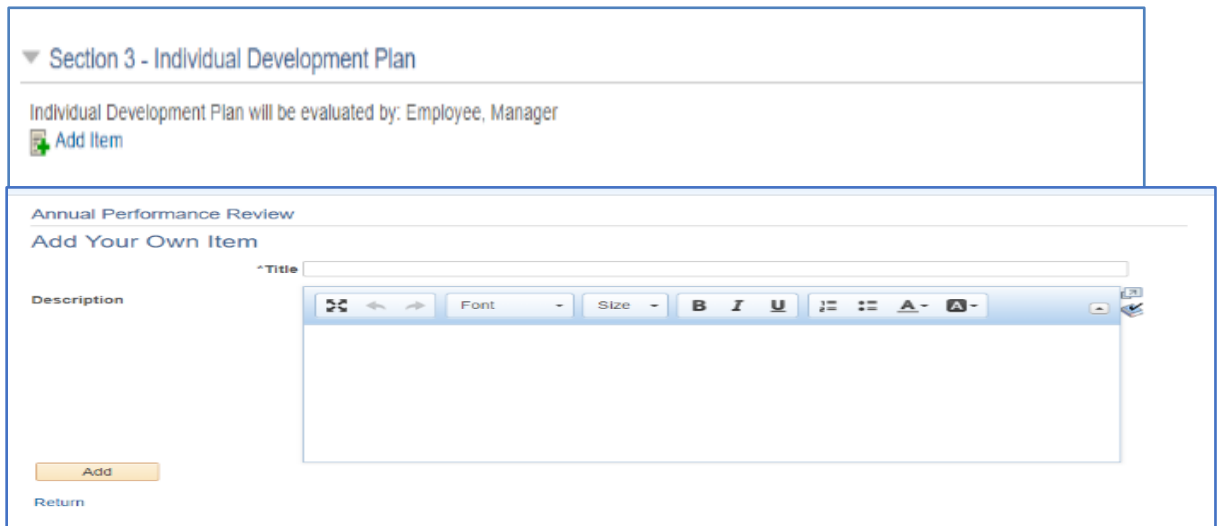
- Development in the current role:
    - Applies to employees who are new in the job and need developmental activities to helpthem become a fully successful performer.
    - Employees who are deficient in their current role (not functioning at the level they needto be in order to be fully successful 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.
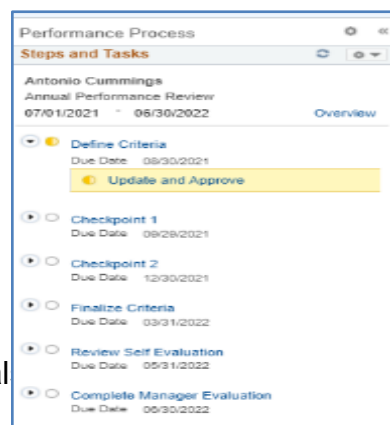
Reminders:

• 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".**

Section 3 - Individual Development Plan

Individual Development Plan will be evaluated by: Employee, Manager

Add Item

Annual Performance Review
Add Your Own Item

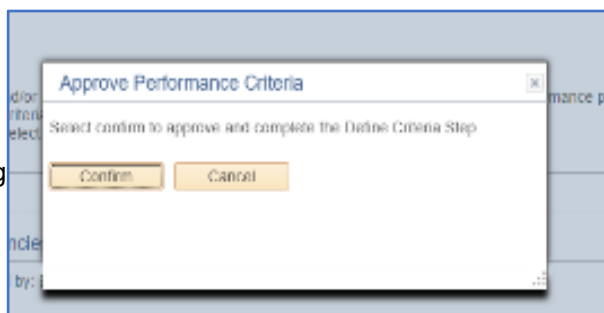^Title

Description

Add

Return

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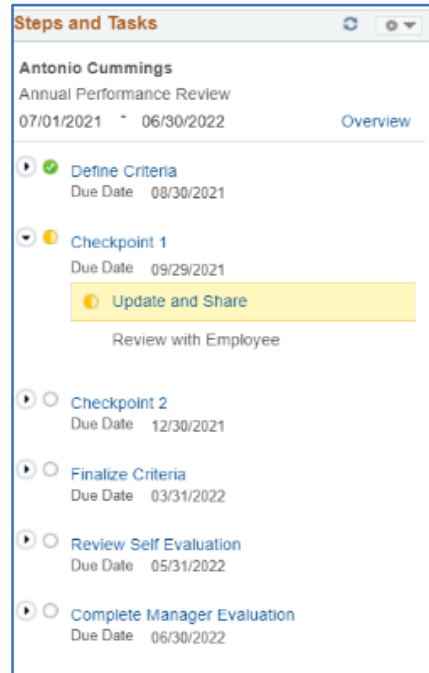3. Next Click **"Update and Approve"** located in the **Steps and Tasks** panel.

Performance Process

Steps and Tasks

Antonio Cummings
Annual Performance Review
07/01/2021 - 06/30/2022   Overview

Define Criteria
Due Date 08/30/2021
   Update and Approve

Checkpoint 1
Due Date 09/28/2021

Checkpoint 2
Due Date 12/30/2021

Finalize Criteria
Due Date 03/31/2022

Review Self Evaluation
Due Date 05/31/2022

Complete Manager Evaluation
Due Date 06/30/2022

*Note: You may al .... on, located next to **"Save".**

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

Approve Performance Criteria   ×

Select confirm to approve and complete the Define Criteria Step

Confirm   Cancel

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 Documents

                                                                                                                  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

Creating ePerformance Checkpoint Performance Plans for Managers | Prepared by DOAS/HRA
Revised November 2023