I-PERFORM QUESTIONS AND ANSWERS

What is I-PERFORM?

A. I-PERFORM is a web-based employee performance management tool being developed through a collaborative effort with agencies.

B. I-PERFORM allows agency personnel the ability to electronically create, document, compose, review, comment, finalize, update and retrieve employee evaluations.

C. There are currently two phases – Phase one is the development of the electronic evaluation form; Phase two is the system enhancements (business requirements are currently being defined).

DIRECTORS/APPOINTING AUTHORITY

1) **What is Phase 1:**

   A. The initial development of I-PERFORM will allow state agency personnel to document, compose, review, route, comment, finalize, update, store and retrieve employee evaluation records in a web-based application.

2) **When will phase one of the system be completed?**

   A. Phase 1 of the I-PERFORM system will be completed in January 2012 which will offer agencies access to an online performance evaluation process.

3) Will all executive branch agencies be required to use this system?

   A. Yes. In order to support statewide consistency and efficiencies, the Governor has directed there will be one.

4) What is the timeframe for agencies to begin using the new system?

   A. All agencies may transition to the system starting in January 2012. The timeframe for transitioning to the system will be the agency director's decision.

   B. The HR focus group DHR is developing a transition template that will be available to agencies.

5) Will Executive Branch agencies be required to use the four Performance Expectations on the performance evaluation?

   A. Yes.

6) Will agencies have the ability to add Performance Expectations to the performance evaluation?

A. Yes.

7) Where will the system be housed/ maintained?

A. The system will be housed with the other applications offered by SCO. The system will be accessed at the SCO web page: www.sco.idaho.gov.

8) Can I-PERFORM be accessed from home or an individual I-Pad, PDA, etc.?

A. I-PERFORM is web accessible through SCO'S website just as I-TIME is currently.

9) Will there be a cost to agencies using the system?

A. Phase one was paid for by DHR and partnering agencies. SCO is currently preparing a cost estimate for Phase 2.

10) When will phase two be completed?

A. No date has been determined yet. DHR has a list of phase two business requirements. A cost and time analysis will be conducted in January.

11) How do I transition to the new system?

A. Contact your HR Consultant at the Division of Human Resources.

12) Will agencies have the option of using individual rating areas for performance expectations?

A. Yes.

13) How does the new system ensure the quality of the evaluation?

A. I-PERFORM is a tool. Agency management is accountable for the consistent application of performance expectations and oversight for them within their agency.

AGENCY HR STAFF

1. Will there be established performance criteria for the four statewide expectations: Professionalism, Promoting a Responsible Government, Customer Focus and Leadership?

A. Yes. The Division of Human Resources is working in conjunction with the HR Focus Group on providing additional clarification of the statewide standards.

2. What reporting capabilities will the system have?

A. This will be determined upon completion of defining Phase 2 business requirements.

3. **Will the system have the ability to import I-TIME so agencies do not have to load all employee information?**

   A. Yes, I-TIME will directly download employees' information to I-PERFORM.

4. **Will the system download performance evaluation data that now requires data entry by HR staff?**

   A. Yes, the system will download the performance evaluation data; there will be no separate requirement for data entry.

5. **Will supervisors be able to open, create, modify, and save evaluations?**

   A. Yes.

6. **Will phase one have an option to print the evaluation for discussion with the employee and/or to put in the employee file?**

   A. Yes. A supervisor may print the evaluation and/ or attachments at any time.

7. **Will there be security levels to view an employee's evaluation after the supervisor completes the evaluation?**

   A. Access to review the employee's performance evaluation will be determined based on who is in the routing of that evaluation. This could be the supervisor, assigned reviewer(s) and appointing authority. Routing of the evaluation will be downloaded and mirror the I-Time routing. Agencies may revise the routing to their needs.

8. **Will the reviewer be able to review the evaluation before the employee sees it?**

   A. Yes. Once the evaluation is completed, the supervisor has the option of routing it for review to pre-identified reviewer(s) prior to finalizing it for the employee. The reviewer would typically be the supervisor's manager or agency human resource staff. Routing of the evaluation is determined by the agency.

9. **Can an employee's access to an evaluation be restricted until it has been reviewed by HR? For example; HR may need to review an evaluation with a DNA rating before it is viewed by the employee.**

   A. This will be a decision made by agency management. The employee will be able to view his/her evaluation when it is finalized by the supervisor. If the agency wants HR to view the evaluation prior to the employee, the supervisor should route the evaluation to HR before finalization.

10. **Can an original evaluation be modified if changes are needed after it has been permanently filed? For example; an employee and agency may agree to changes based on the outcome of a problem solving situation.**

A. Yes, changes can be made by the I-PERFORM agency administrator, with assistance from the State Controller's Office.

11. Will the system accommodate two evaluations at the same time, i.e. annual evaluation and promotional evaluation?

A. No. Only one current evaluation can be drafted in the system, so each evaluation will have to be completed before another one is created.

12. Will there be an Employee Folder? For example, a list of documents and ease of entering notes and finding your documentation.

A. Currently, documents may be attached to the evaluation for reference or to provide supporting documentation to the evaluation. A separate employee folder will be considered in phase 2.

13. Will phase one provide a Development Coach and Job Coach?

A. An online "Development Coach" will be considered in phase two. Development Coach ideas will be a part of the initial system training on performance management.

14. Will there be examples for text language and a Language Scan option for evaluations?

A. No. Canned language for evaluations is not good business practices and therefore will not be incorporated in I-PERFORM.

15. Will there be a "system check" on evaluation types? In other words, will the system have an edit in place to prevent a supervisor from completing an entrance probation evaluation if it really should be an annual evaluation?

A. This edit will be part of the business requirements for phase two.

16. Will there be an auto alert to supervisors when an evaluation is due?

A. This feature will be considered as part of the business requirements for phase two.

17. Are there reports available to track when evaluations are due?

A. Reporting is currently available for many queries though the State Controller's office (IBIS). A further review of reporting features will be a part of the business requirements for phase two. Until that time, agencies should continue the current process for tracking the due dates and completion of evaluations.

18. Will the system calculate retention points?

A. This feature will be added to the business requirements in phase two.

19. Will the system have a template for Performance Improvement Plans?

A. This feature will be added to the business requirements in phase two.

20. Will the system have a template for NOCAs and LODAs?

A. This feature will be part of phase two.

21. Will there be a 360° evaluation?

A. A 360° evaluation will be added for consideration to the phase two business requirements as an option to agencies. Agencies currently using 360° evaluations forms may attach the document to the evaluation in I-PERFORM.

22. Will the system have a self-assessment tool?

A. This feature will be considered in phase two as an option to agencies. Agencies can continue to use current self-assessment forms and attach the document to the evaluation in I-PERFORM.

27. How and when will end users be trained on the system?

A. End users will be trained by DHR or their agency HR staff. Initial training for HR staff will take place in January 2012.

28. How will agency staff obtain performance evaluations on employees in another agency? How long will that process take?

A. The ability to transfer evaluations from agency to another will be considered for phase two. Until that time, agencies should contact other agencies to review employee evaluations, the current process for checking an applicant's prior performance should be used.

EMPLOYEES

1. **Will I have access to my performance evaluation?**

   A. Yes. Once an evaluation is completed and your supervisor has discussed it with you, the document will be stored and easily accessible to you at any time via I-PERFORM.

2. **Will I be able to obtain past and present performance evaluations from the past through I-PERFORM?**

   A. Any evaluation that was completed using the I-PERFORM system will be accessible to employees regardless of how much time has past.

3. **Who will have access to the employee information?**
    A. Security levels and who has access to what information will be determined by the agencies.