

**I-PERFORM
Performance Management
System**



Employee Guide

State of Idaho
Division of Human Resources
208.334.2263
<http://dhr.idaho.gov/>

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I-PERFORM General Information

I-PERFORM is an online application that supports a statewide performance management system for state agencies. In addition to the ability to document, create, review, finalize, and retrieve employee evaluation records, supervisors have the ability to quickly document day-to-day performance. The development of I-PERFORM is a collaborative effort between the Division of Human Resources (DHR), The State Controller's Office (SCO), and other state agencies represented in the I-PERFORM Oversight Committee, and the I-PERFORM Human Resources Focus Group.

If you experience any problems with this application please contact your agency I-PERFORM system administrator or the Division of Human Resources (208) 854-3080. If you have any suggestions for this help manual please contact the Division of Human Resources.

Division of Human Resources
304 N. 8th Street, Suite
Boise, ID 83720-0066 (208) 854-3080

iperformhelp@dhr.idaho.gov

I-PERFORM Employee User Guide

EMPLOYEE PERFORMANCE EXPECTATIONS (STANDARDS) CROSSWALK Rev: 3/4/2012

This cross walk will help you and your staff members understand the correlation between the performance standards as listed in the previous performance evaluation and the 2012 performance expectations. Note: Standards from prior evaluation form will be duplicated within the revised performance expectations.

2012 Performance <i>Expectations</i> :	Previous Performance Standards:
<p>PROFESSIONALISM This performance expectation evaluates the employee's competence in quality of work, dependability, adaptability/flexibility, and respect for others.</p>	<p>Adaptability/Flexibility: This describes how well the employee adapts to change and is open to different and new ways of doing things. Dependability: This describes how well the employee completes assigned work in a timely manner. The employee meets attendance requirements. Interpersonal Skills: This describes how well the employee establishes and maintains effective work relationships. Demonstrates good communication and listening skills. Practices respect for others. Demonstrates conflict resolution skills. Quality: This describes the employee's work in terms of consistency, thoroughness, and accuracy. Work Environment/Safety: This describes how well the employee promotes a respectful workplace and complies with general conditions of employment, EEO, security, and workplace safety policies.</p>
<p>PROMOTING RESPONSIBLE GOVERNMENT This performance expectation evaluates the employee's competence in adaptability, dependability, productivity, efficiency, work environment and safety.</p>	<p>Adaptability/Flexibility: This describes how well the employee adapts to change and is open to different and new ways of doing things. Dependability: This describes how well the employee completes assigned work in a timely manner. The employee meets attendance requirements. Productivity: This describes how the employee manages and completes workload expectations and demonstrates the knowledge and skills needed to do the job.</p>
<p>CUSTOMER FOCUS: This performance expectation evaluates the employee's competence in customer service, conflict resolution, interpersonal skills, and communication.</p>	<p>Adaptability/Flexibility: This describes how well the employee adapts to change and is open to different and new ways of doing things. Customer Service: This describes how well the employee works with internal and external customers to achieve desired results and maintain positive relationships. Interpersonal Skills: This describes how well the employee establishes and maintains effective work relationships. Demonstrates good communication and listening skills. Practices respect for others. Demonstrates conflict resolution skills. Work Environment/Safety: This describes how well the employee promotes a respectful workplace and complies with general conditions of employment, EEO, security, and workplace safety policies.</p>
<p>PERFORMANCE EXPECTATION: LEADERSHIP This performance expectation evaluates the employee's competence to motivate people and efficiently manage resources in achieving the agency's mission.</p>	<p>Encompasses all facets of previous standards from supervisor/manager level.</p>

Performance Management Best Practices

Performance evaluations assist employees in developing their careers and being successful in their jobs. They describe expectations and objectives for all state employees. Performance evaluations help to ensure:

1. The agency mission and vision are achieved.
2. There is statewide consistency to the extent possible.
3. Legal requirements are met (Ref. I.D.A.P.A 67-5309(h)).
4. Personnel decisions are justifiable and equitable based on performance documentation.

Effective performance management establishes a year-round partnership between the employee and the supervisor while creating a shared understanding about the work that is to be accomplished and how that work is to be done.

The best performance management systems include the components of:

- Setting expectations and resetting them as they change.
- Evaluating current skills, identifying missing skills, and creating a development plan to close existing skill gaps.
- Providing consistent, effective, and timely feedback and coaching.
- Immediately and consistently documenting effective and ineffective actions and behaviors to demonstrate trends.
- Creating an environment where employees can feel motivated.
- Ensuring complete, shared understanding of the State and agency performance ratings.
- Utilizing a system to bring consistency and reporting of performance ratings across agencies.
- Delivering an evaluation that is fair, accurate, free of bias, and informative.



Our focus today!

I-PERFORM Employee User Guide

I-PERFORM Roles

Role	Responsibility	Access Rights
Employee	<ul style="list-style-type: none"> Review both current and past performance evaluations for clarity of: <ul style="list-style-type: none"> Expectations Developmental opportunities Agreed up actions to be taken for development Documentation of performance 	<ul style="list-style-type: none"> View draft evaluation once forwarded by supervisor Add comments to the evaluation on the cover sheet View documentation and attachments once the evaluation is marked complete by the
Supervisor	<ul style="list-style-type: none"> Create and maintain performance evaluations for staff Follow routing and approval processes of the agency Utilize the four Performance Expectations as set forth by the Office of the Governor Obtain a clear understanding of the individual rating distinctions, and apply them consistently and without bias 	<ul style="list-style-type: none"> Create and delete "Draft" status evaluations Review comments by reviewers and employees Add and delete documentation and attachments, before the evaluation is transmitted to SCO Return an evaluation to "Draft" Status (if the evaluation has not yet been signed by the
Reviewer	<ul style="list-style-type: none"> Assist the supervisor in creating a clear, concise, specific, informative, and legally-defensible performance evaluation Check for common errors 	<ul style="list-style-type: none"> View evaluations Enter comments into the review window, which are submitted back to the supervisor
Administrator	<ul style="list-style-type: none"> Create the agency-specific routing structure within I-PERFORM Create additional administrators for the agency* Create and maintain agency evaluation standards Create agency appointees, if used Assist supervisors and employees with questions or issues related to I-PERFORM A request form for assigning administrators is available on the Division of Human Resources website http://dhr.idaho.gov/iperform.html. 	<ul style="list-style-type: none"> View evaluations View/edit routing structure Create agency structures within I-PERFORM Create/Maintain performance expectations
Agency Appointee	<ul style="list-style-type: none"> Act as the last sign off on the performance evaluation after it has been discussed with the employee 	<ul style="list-style-type: none"> View/review performance evaluations
DHR	<ul style="list-style-type: none"> Provide oversight on the I-PERFORM system Provide training and support to agencies 	<ul style="list-style-type: none"> View all performance evaluations Return performance evaluations to draft status if it has not been transmitted

I-PERFORM Employee User Guide

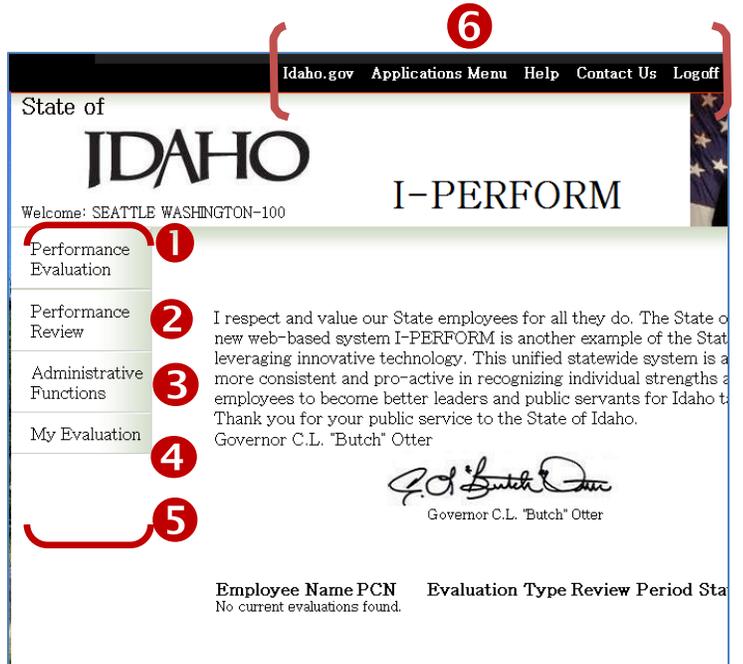
Access I-PERFORM

Sign on to the State Controller's Office Application Menu and click on **DHR I-PERFORM** from the right-hand column on the bottom of the screen.



The left frame functions as navigation between the areas of I-PERFORM. Depending on the individual's role this menu will have different options:

1. **Performance Evaluation** is available to supervisors and allows access to create and/or maintain their employee's evaluations.
2. **Performance Review:** Designated employees can view pending evaluations that have been assigned to them for review.
3. **Administrative** functions are for designated agency I-PERFORM administrative personnel. Allows for role assignments and system set-up.
4. Supervisors can capture notes during the review period by selecting **Supervisor Employee Folder**.
5. All employees can access their performance evaluation by clicking on **My Evaluation**.
6. The main navigation bar at the top of the screen will remain static; however available options may change from page to page based in the employee's assigned role.



General Navigation Tips



Use **EXIT** on each screen to return to the home screen. Depending where you are in the system, clicking the browser “back” button may give you an error message or keep returning to the same screen. You will receive a message reminding you to save.



I-PERFORM uses Microsoft Outlook to send notifications during the routing process. To ensure that emails do not get caught in your junk or blocked folders, add the system email address to your safe list.

- In Outlook click on the drop down list for **Junk** from the home tab.
- Click on **Junk E-mail Options**.
- Click on the **Safe Senders** tab.
- Copy or type in this address: SCOapps_Admin/SCO.APPS@apps.sco.idaho.gov.
- Click **Add**.
- Click **OK**.



A **Spell Check** feature is available for all text in the evaluation.

- Clicking the Spell Check button in the top navigation bar checks the entire evaluation.
- Clicking on one of the red check marks  displayed throughout the document checks that specific section.



Windows Internet Explorer 8

Your version of Internet Explorer (IE) is important to the complete functionality of I-PERFORM. If your agency has moved to IE9 you will experience errors related to incompatibility. IE8 provides optimal performance.



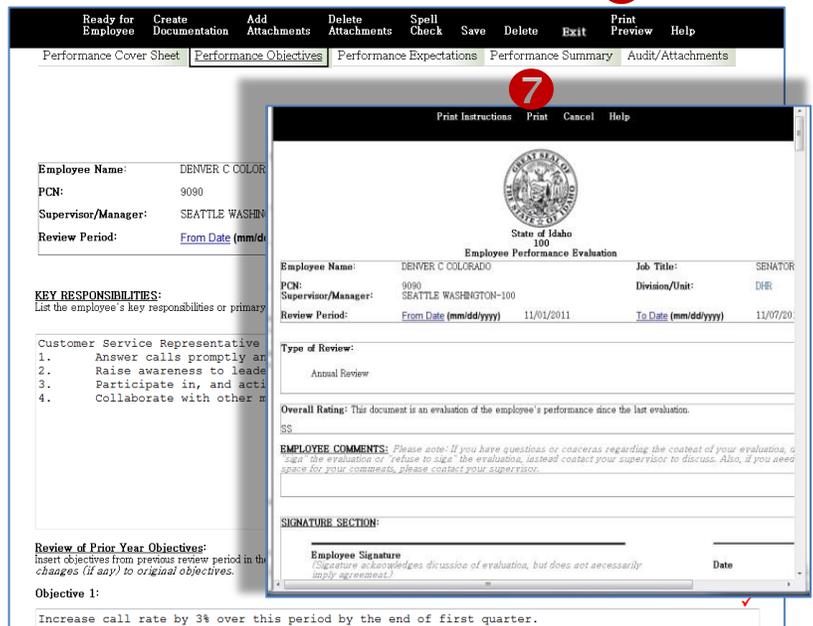
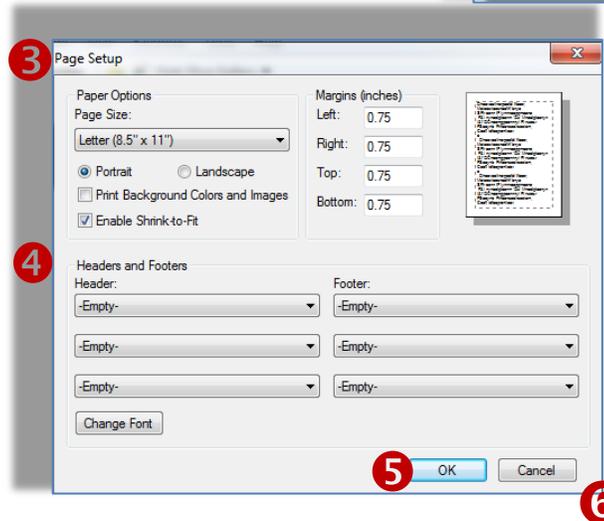
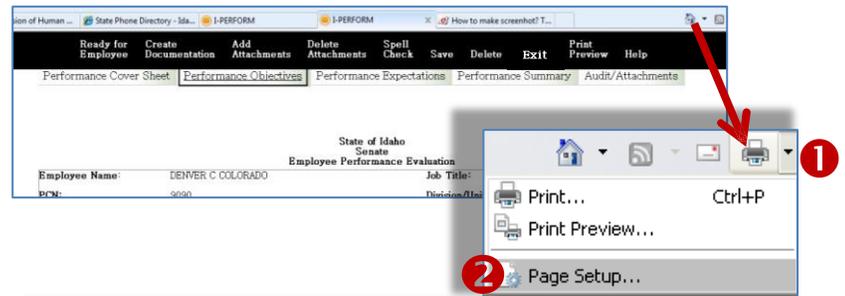
Like I-Time, your systems will **time-out** for security reasons. The length of time before timing out is 3-4 hours. To avoid losing work, save **VERY** frequently.

I-PERFORM Employee User Guide

Printing

The **Print** feature in I-PERFORM requires specific printer settings due to the web based application. By setting up the printer correctly for this application pages will print without overlapping text.

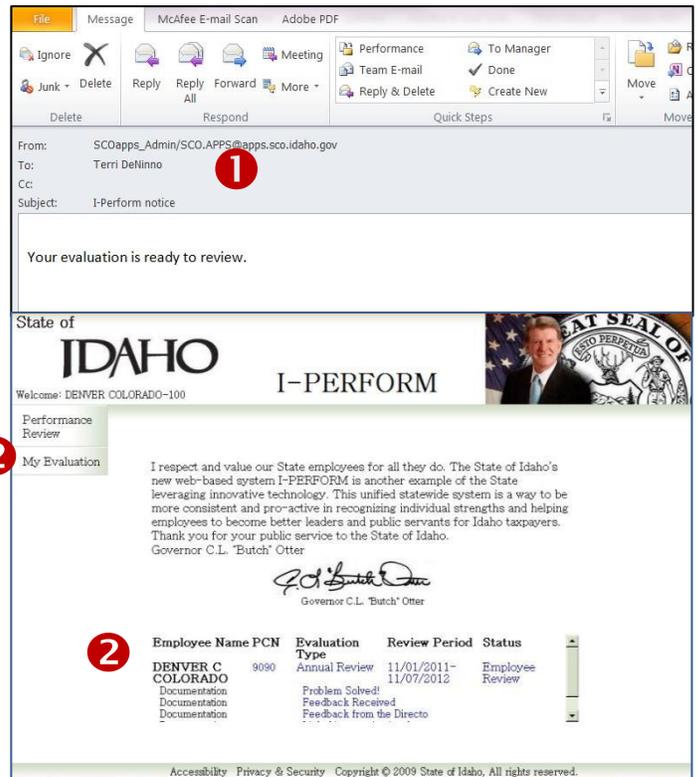
1. Click on the **drop down arrow** next to the printer icon at the top of the web page.
2. Select **Page Setup**.
3. A new screen will open. Ensure **Enable Shrink-to-Fit** is checked.
4. Under **Headers and Footer**, click on each field and change the option to Empty.
5. Click **OK**.
6. To print, click on **Print Preview**.
7. In the Print window click **Print**.
8. Select your printer and click **OK**.



Using I-PERFORM: *Employees*

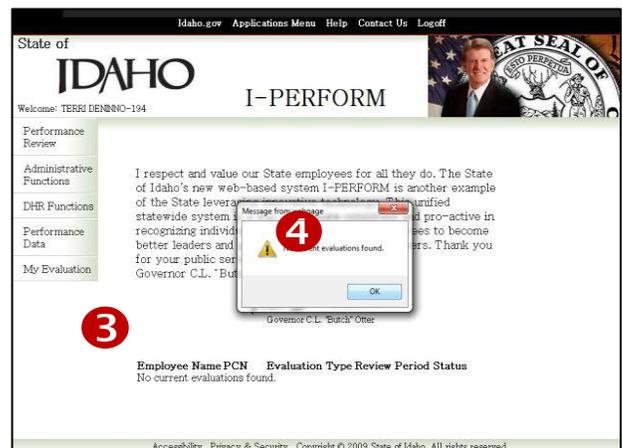
As an employee, you have the ability to see your past evaluations once they have been completed. If prior years were not completed using the I-PERFORM system you will not be able to see them in I-PERFORM; you may request a copy from your Agency HR Representative.

1. You will receive an email from I-PERFORM when a new evaluation is available for viewing. To ensure receipt of emails from I-PERFORM, add the email address: SCOapps_Admin/SCO.APPS@apps.sco.idaho.gov to your Safe List as described in the section on General Navigation; page 7.
2. Upon receipt of the notification email, log into I-PERFORM and click on **My Evaluation**. Evaluations available for review will be listed at the bottom of the I-PERFORM screen.



The evaluation is *not* ready for your review yet if:

3. The bottom of the screen indicates **No Current Evaluation Found**, and/or
4. You clicked on My Evaluation and see the message "No Current Evaluation Found".



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Review your evaluation:

When the evaluation is ready for employee review, click on **My Evaluation**.

1. The first screen you will see is the *Performance Cover Sheet*, as indicated by the tab at the top of the page. This page displays personal information, the dates the current performance evaluation covers, the type of review for this period, and the overall rating for this period.
2. Click on the **Performance Objectives** tab.
3. Review the *Key Responsibilities*, describing your primary job functions.
4. Review the *Objectives* from the prior year, summarizing the areas of desirable growth for the current year. As you review, make notes of anything you would like to discuss with your supervisor.
5. Scroll down to *Review of Prior Year Employee Development Plan*, which includes your supervisor's comments on your progress toward meeting previously discussed goals. Again, make note of any items you would like to discuss with your supervisor.



This is a DRAFT evaluation of your performance. If there is anything you see on this or following pages that causes you concern, schedule time with your supervisor to discuss the ratings and/or comments **BEFORE** adding your final comments, signing, or refusing to sign.

Ready for Employee | Create Documentation | Add Attachments | Delete Attachments | Spell Check | Save | Delete | Cancel | Print Preview | Help

Performance Cover Sheet | Performance Objectives | Performance Expectations | Performance Summary | Audit/Attachments

State of Idaho
Senate
Employee Performance Evaluation

Employee Name: DENVER C COLORADO Job Title: SENATORS
PCN: 9090 Division/Unit: DHR
Supervisor/Manager: SEATTLE WASHINGTON-100
Review Period: From Date (mm/dd/yyyy) 11/01/2011 To Date (mm/dd/yyyy) 11/07/2012

Type of Review:
 Annual Review Entrance Probation Promotion Probation
 Transfer Separation from State Service Other

Overall Rating: This document is an evaluation of the employee's performance since the last evaluation.
 Exemplary Performance: This rating is used for special circumstances for employees that should receive special recognition for assigned projects that are completed with significant results and have a significant impact on agency business.
 Solid Performance: This employee exceeds performance expectations.
 Achieves Performance: This employee meets performance expectations OR this employee is developing new skills, gaining new knowledge, or new to the position.
 Does Not Achieve Performance: This employee's performance needs improvement OR is unacceptable in accordance with Rule 190, 152, and 153.
 NA Not Applicable

EMPLOYEE COMMENTS: Please note: If you have questions or concerns regarding the content of your evaluation, do not click "sign" the evaluation or "refuse to sign" the evaluation, instead contact your supervisor to discuss. Also, if you need additional space for your comments, please contact your supervisor.

Ready for Employee | Create Documentation | Add Attachments | Delete Attachments | Spell Check | Save | Delete | Cancel | Print Preview | Help

Performance Cover Sheet | Performance Objectives | Performance Expectations | Performance Summary | Audit/Attachments

Supervisor/Manager: SEATTLE WASHINGTON-100 Division/Unit: DHR
Review Period: From Date (mm/dd/yyyy) 11/01/2011 To Date (mm/dd/yyyy) 11/07/2012

KEY RESPONSIBILITIES:
List the employee's key responsibilities or primary purpose:

Customer Service Representative Key Responsibilities ✓
1. Answer calls promptly and efficiently, keeping the goals of the department in mind.
2. Raise awareness to leadership of trends in problems/complaints.
3. Participate in, and actively seek, professional development training.
4. Collaborate with other members of the team on additional projects as they arise.

Review of Prior Year Objectives:
Insert objectives from previous review period in the space below and discuss the extent to which each objective was fulfilled. Also describe changes (if any) to original objectives.

Objective 1: ✓
Increase call rate by 3% over this period by the end of first quarter.
Denver, you continually improved your call volume and call time. During review of your calls I identified that you are now beginning the conversation in more receptive and positive way. You are efficiently calming the customer down, asking great questions and offering multiple options. Great job!

Ready for Employee | Create Documentation | Add Attachments | Delete Attachments | Spell Check | Save | Delete | Exit | Print Preview | Help

Performance Cover Sheet | Performance Objectives | Performance Expectations | Performance Summary | Audit/Attachments

REVIEW OF PRIOR YEAR EMPLOYEE DEVELOPMENT PLAN:
Insert development plan from previous review period in the space below, if applicable. Discuss the extent to which the development plan was fulfilled.

Increase effectiveness on the job to prepare for increased customer satisfaction. ✓

Developmental Objective 1: ✓
Increase customer service skills by attending the following workshops
- Communication 101
- Diffusing Angry Customers
- Everyday Problem Solving
You completed all of these courses and shared your learning with not only me, but the rest of the staff as well, which has allowed all to benefit and raise their skills also. Your behaviors reflect your commitment to the courses and the responsibility to apply what you learned.

Developmental Objective 2: ✓

I-PERFORM Employee User Guide

Review the Evaluation, Continued:

6. Click on **Performance Expectations**. This page describes the expectations in each of the State's four defined categories of *Professionalism*, *Promoting Responsible Government*, *Customer Focus*, and for managers and supervisors, *Leadership*. Each section includes descriptions for each of the ratings and examples of observable performance standards. Read through each, noting any comments you would like to discuss with your supervisor.
7. Review *Comments* for each performance expectation area.
8. As you read, you may see notes under the fields titled *Documentation*. These could be any type of documentation related to your performance throughout the review period.
9. If there is documentation attached you will be able to read the detail by clicking on the *Audit/Attachments* tab.

Ready for Employee | Create Documentation | Add Attachments | Delete Attachments | Spell Check | Save | Delete | Cancel | Print Preview | Help

Performance Cover Sheet | Performance Objectives | **Performance Expectations** | Performance Summary | Audit/Attachments

Supervisor/Manager: SEATTLE WASHINGTON-100 LTRK

Review Period: From Date (mm/dd/yyyy) 11/01/2011 To Date (mm/dd/yyyy) 11/07/2012

EMPLOYEE PERFORMANCE EXPECTATIONS

The following rating levels are examples of the performance expectations employees would be demonstrating when rated at one of the three levels: Achieves Performance, Solid Performance, or Exemplary Performance. These examples are meant to assist the supervisor and employee during the performance evaluation discussion in identifying the current level of performance. In addition, this should assist in describing what additional behaviors the employee would need to demonstrate to achieve a higher rating. These examples are not intended to be all inclusive.

PERFORMANCE EXPECTATION: PROFESSIONALISM
performance expectation evaluates the employee's competence in quality of work, dependability, adaptability/flexibility, confidentiality, and respect for others.

Description of the expectation:
EXEMPLARY PERFORMANCE:
Employee meets and often exceeds expectations for performance expectations listed at Solid Performance level AND consistently demonstrates performance such as:

- Employee is recognized as highly skilled and knowledgeable in their field, actively sought after for advice and guidance
- Exceptional quantity of work, often ahead of schedule and can be depended upon to work independently
- Assigned to special agency projects or is assigned to represent agency in meetings
- Tracks trends on concerns and anticipates issues or problems regarding agency or statewide initiatives
- Consistently looks for improvements to streamline processes or cost efficiencies
- Switches tactics and strategies when planned approaches do not work
- Ensures next level of supervision or management has information for decisions
- Exerts a major positive influence on management practices, operating procedures, and program implementation, which has contributed substantially to organizational growth and recognition.
- Proactive and demonstrates foresight in correcting situation that may cause future problems

SOLID PERFORMANCE:
Employee meets and often exceeds expectations for performance expectations listed at Achieves Performance level AND consistently demonstrates performance such as:

- Relied upon to provide consultation or technical assistance within agency
- Adopts practices to improve work processes, enhance customer satisfaction and ensure excellence in daily work

1

COMMENTS

You have demonstrated significant improvement in all areas, a desire to continue growing in your area of expertise, and have been open to stretching your comfort level. The impact to the customers and coworkers alike has been great due to the items mentioned in the Objectives and Developmental sections of this evaluation. You have even received comments from our internal customer and coworkers! These behaviors demonstrate a strong professional focus.

DOCUMENTATION

Date Comments



The Performance Review Process should be a collaborative effort. That means you have a responsibility in the process as well.

If you have received compliments from others, send them to your supervisor throughout the year to be included in the documentation!

- Click on the **Performance Summary** tab. Read what your supervisor has written, which should summarize the witnessed performance during the review period.
- Review comments listed in the *Objectives for Next Review Period* section. Once you and your supervisor have completed the evaluation discussion, you should work collaboratively to determine the steps you will take to address each performance objective for next year. Your supervisor may have already placed some comments in this field to use for discussion. When finalized, this plan should follow SMART criteria as described below.

Ready for Employee Create Documentation Add Attachments Delete Attachments Spell Check Save Delete Cancel Print Preview Help

Performance Cover Sheet Performance Objectives Performance Expectations **Performance Summary** Audit/Attachments

PERFORMANCE SUMMARY

Use this section to summarize the employee's performance for the review period. When providing comments, consider the employee's performance against objectives, key issues from the Employee Performance section above, and strengths/potential improvements.

Summary: ✓

Denver, you have always been a good employee and with your focus on growth this year have really stepped up and have made significant impacts to the department. You have modeled professionalism to the rest of the staff consistently through your actions and behaviors as described throughout.

OBJECTIVES FOR NEXT REVIEW PERIOD:

Use the following section to record objectives for the next review period.

Learn skills necessary to become the department trainer for new employees. This will allow you to formally share your skills and continue to hone them. ✓

SMART Criteria

Anytime goals are created they should be defined in a way that is clear and targeted. The SMART acronym has been used for many years to help add structure to goals so they can be meaningful and it allows us to know when we achieved exactly what we wanted to have happen.



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Finish the Evaluation

1. Click on **Performance Cover Sheet** tab.
2. If you are satisfied with the evaluation, add your comments in the **Employee Comments** field. If you would like to talk to your supervisor about your evaluation schedule time with them. If changes are made to the evaluation based on the discussion, it will be returned to you for comments and your signature once more.
3. When done, click on **Sign** on the top of the screen in the black bar. Your name will be added to the final copy in the field above the Supervisor's signature. The evaluation will then be routed for final approval.
4. If you choose NOT to sign, click on **Refuse to Sign**. Talk to your supervisor first about the implications of this choice.
5. A pop-up box will appear informing you that this action finalizes the evaluation process and cannot be changed. If ready, click **OK**.
6. Your electronic signature is added to the evaluation document.
7. The evaluation process involves a routing process, including review by another manager prior to presenting the evaluation to you. The last reviewer's signature is also included on the evaluation.

3 **4**

Sign Refuse to Sign Spell Check Save Exit Print Preview Help

Performance Cover Sheet Performance Objectives Performance Expectations Performance Summary Audit/Attachments

1

State of Idaho
Senate
Employee Performance Evaluation

Employee Name: DENVER C COLORADO Job Title: SENATORS
PCN: 9090 Division/Unit: One
Supervisor/Manager: SEATTLE WASHINGTON-100
Review Period: From Date (mm/dd/yyyy) 01/01/2013 To Date (mm/dd/yyyy) 01/15/2013

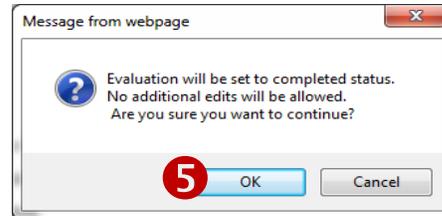
Type of Review:

Annual Review Entrance Probation Promotion Probation
 Transfer Separation from State Service Other

Overall Rating: This document is an evaluation of the employee's performance since the last evaluation.

Exemplary Performance: This rating is used for special circumstances for employees that should receive special recognition for assigned projects that are completed with significant results and have a significant impact on agency business.
 Solid Performance: This employee exceeds performance expectations.
 Achieves Performance: This employee meets performance expectations OR this employee is developing new skills, gaining new knowledge, or new to the position.
 Does Not Achieve Performance: This employee's performance needs improvement OR is unacceptable in accordance with Rule 190, 152, and 153.
 NA Not Applicable

2 EMPLOYEE COMMENTS: Please note: If you have questions or concerns regarding the content of your evaluation, do not click "sign" the evaluation or "refuse to sign" the evaluation, instead contact your supervisor to discuss. Also, if you need additional space for your comments, please contact your supervisor.
Thank you Seattle for working on this evaluation with me. It was a great experience, and I appreciate your cajdor and collaboration. Looking forward to the next 12 months!



SIGNATURE SECTION:

6 DENVER COLORADO-100 1/16/2013 7:49:55 AM
Employee Signature Date
(Signature acknowledges discussion of evaluation, but does not necessarily imply agreement)

SEATTLE WASHINGTON-100 1/16/2013 7:41:27 AM
Supervisor Signature Date
(Signature acknowledges that this evaluation and key responsibilities have been discussed with the employee.)

7 BAKER OREGON-100 1/16/2013 7:40:28 AM
Reviewer Signature Date

Troubleshooting

TROUBLESHOOTING CONTENTS

[Copy and Paste into I-PERFORM](#)

[Print to PDF \(If available on your system\)](#)

[Showing Script Errors](#)

[Issues and Solutions](#)

I-PERFORM Employee User Guide

Topic: Copy and Paste into I-PERFORM

When you first use I-PERFORM there is information required that is not pre-populated. You have choices; you can either re-enter all of the information needed, or copy or paste it from any other document.

ERROR:

When copying and pasting directly into I-PERFORM you may see interesting characters where you did not see them before.

Because there is so much formatting within documents, some that you are not even able to see, it is important to strip all of the formatting before inserting into I-PERFORM. This will prevent characters and formatting that make it difficult to read the information.

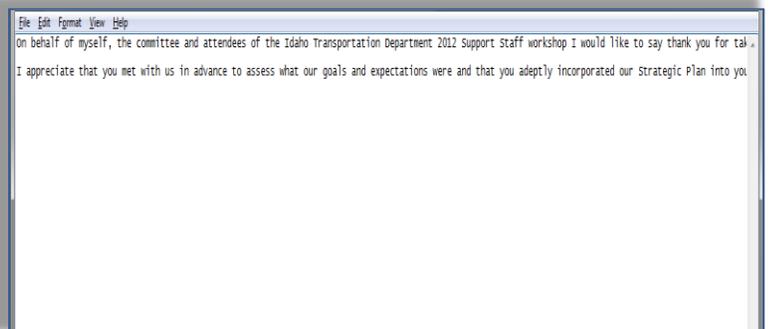
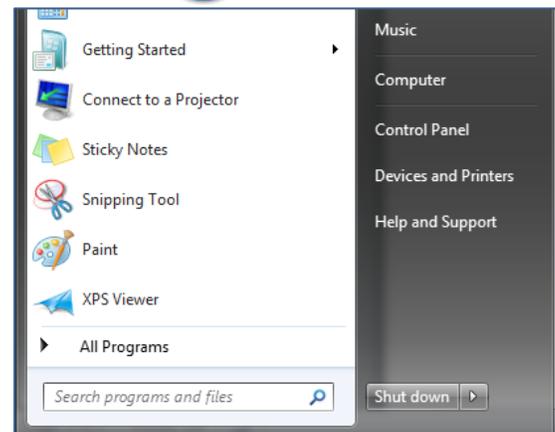
KEY RESPONSIBILITIES:

List the employee's key responsibilities or primary purpose:

Admin. Assistant 2 Key Responsibilities
¶#661; Answer phones promptly and professionally. Route calls a
¶#661; Bring Vicki food on a daily basis.
¶#661; Arrange department fun times.
¶#661; And, of course, complete other duties as assigned.

How To:

1. Open any document or email that contains information required. Use your Microsoft Word copy feature to select the data you would like to copy.
2. Click on the Start icon in the lower left corner of your monitor screen.
3. In the *Search programs and files* field, type **Notepad**.
4. A new window will open, allowing you to now paste the information you copied into the open field. You will notice the lack of formatting available.
5. Now that the formatting is erased, you can again copy and paste it into I-PERFORM without carrying "junk" with it.



I-PERFORM Employee User Guide

Topic: Print to PDF

When printing a performance evaluation you may experience some challenges with the formatting. This is due to the application being a web-based application. If the printing setup instructions on Page 8 of this document do not solve the issue, you can print it to a PDF format and have a more professional looking document. The convert to PDF application is not standard for all state agencies.

How To:

1. While in I-PERFORM, select **Print Preview**.
2. A new screen will open, showing the preview of the document. **Right-click** to display options.
3. Select **Convert to Adobe PDF**.
4. Save it where you wish.
5. You will see a progress window letting you know the conversion has started.
6. If you get a message stating that some of the content may not be available for download, select OK.
7. The PDF version will open in a new window.
8. Follow normal processes for printing the document.

The image shows two overlapping windows from the I-PERFORM application. The background window is the 'Print Preview' window, and the foreground window is the 'Print Instructions' window.

Print Preview Window:

- Menu: Exit, Print Preview, Help
- Tabs: Performance Cover Sheet, Performance Objectives, Performance Expectations, Performance Summary, Audit/Attachments
- Title: State of Idaho Senate Employee Performance Evaluation
- Employee Name: DENVER C COLORADO, Job Title: SENATORS
- PCN: 9090, Division/Unit: One
- Supervisor/Manager: SEATTLE WASHINGTON-100
- Review Period: From Date (mm/dd/yyyy) 01/01/2013, To Date (mm/dd/yyyy) 01/15/2013
- Type of Review: Annual Review, Entrance Probation, Promotion Probation, Transfer, Separation from State Service, Other
- Overall Rating: This document is an evaluation of the employee's performance since the last evaluation.
 - Exemplary Performance: This rating is used for special circumstances for employees that should receive special recognition for assigned projects that are completed with significant results and have a significant impact on agency business.
 - Solid Performance: This employee exceeds performance expectations.
 - Achieves Performance: This employee meets performance expectations OR this employee is developing new skills, gaining new knowledge, or new to the position.
 - Does Not Achieve Performance: This employee's performance needs improvement OR is unacceptable in accordance with Rule 100, 152, and 153.
 - NA Not Applicable

Print Instructions Window:

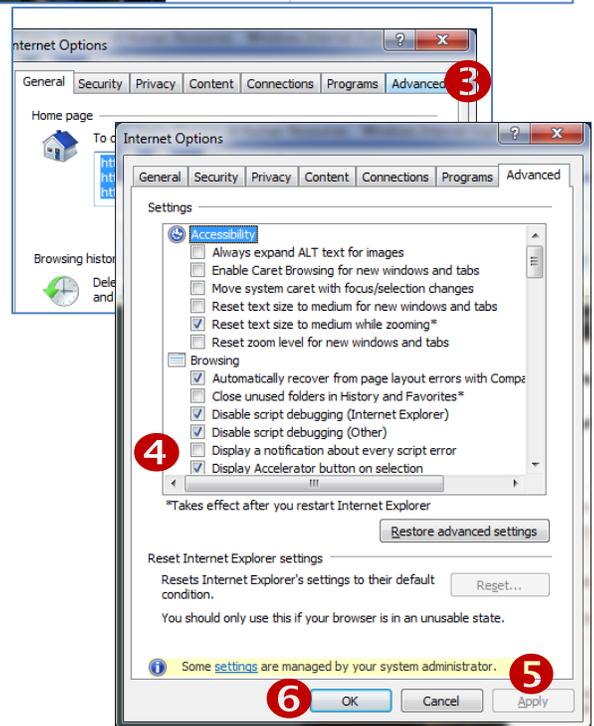
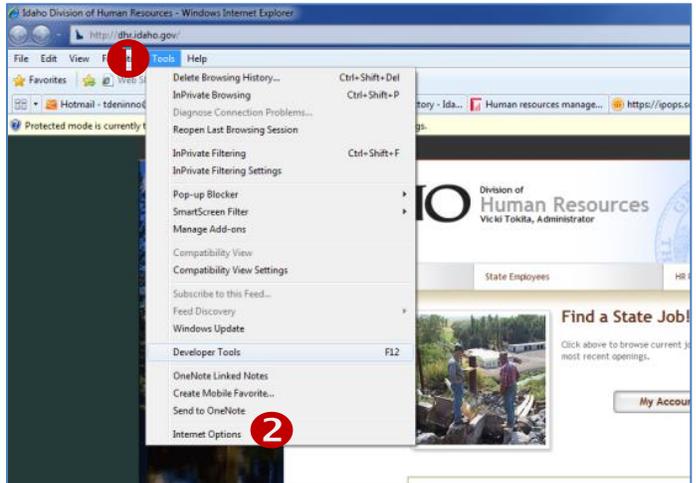
- Menu: Print Instructions, Print, Cancel, Help
- Image: Great Seal of the State of Idaho
- Title: State of Idaho 100 Employee Performance Evaluation
- Button: Create PDF
- Employee Name: DENVER C COLORADO, Job Title: SENATORS
- PCN: 9090, Division/Unit: One
- Supervisor/Manager: SEATTLE WASHINGTON-100
- Review Period: From Date (mm/dd/yyyy) 01/01/2013, To Date (mm/dd/yyyy) 01/15/2013
- Type of Review: Transfer
- Overall Rating: This document is an evaluation of the employee's performance since the last evaluation.
- APS
- EMPLOYEE COMMENTS: Please note: If you have questions or concerns regarding the content of your evaluation click "start the evaluation" or "refuse to start the evaluation" instead contact your supervisor to discuss. Also, if you

Allowing/Showing Error Pop-Ups

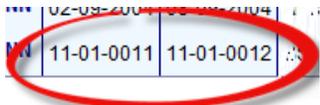
Understanding errors that are occurring in I-PERFORM are important to DHR and SCO so the errors can be identified and fixed. To help with that endeavor please take steps necessary to display errors as they occur. You only need to do this when working within I-PERFORM.

To change settings to allow the errors:

1. Sign into Internet Explorer. Select Tools from the Menu Bar.
2. Click on Internet Options.
3. Click on the Advanced tab.
4. Click within the box labeled Display a notification about every script error.
5. Click Apply.
6. Click OK.



Issues and Solutions

Issue	Description	Solution
Empty Red Box	On the Cover Sheet when I-PERFORM is opened, there is an empty red box with an X in the upper right corner of the box.	<p>Why: Currently the state systems, I-PERFORM, ATS, and others, do not support versions above 8.</p> <p>Do: Check to see what version of Internet Explorer the system is using. Revert back to an earlier version until the new version is tested and ready for use.</p>
Evaluation not showing in DHR's Performance Evaluation system (IPOPS)	The evaluation went through the entire process and was marked complete. The evaluation is not showing in the DHR Performance Evaluation system. Error in creating salary actions show there is no previous evaluation completed.	<p>Why: Two issues come together in this scenario. Currently the state systems, I-PERFORM, ATS, and others, do not support IE versions above 8, and the dates were most likely entered incorrectly. As an example, "0011" instead of "2011". In other versions of IE an error message would be provided; Version 9 or 10 will not provide this message and will accept the erroneous date.</p> <p>Do: Revert back to an earlier version until the new version is tested and ready for use and contact DHR to return the evaluation to draft status to allow the supervisor to correct the dates.</p>
The system times out	After working in I-PERFORM SAVE is clicked, and the screen goes back to the log in screen. Work was not saved.	<p>Why: Timeout is a security function of the state system, not a part of I-PERFORM.</p> <p>Do: Save VERY frequently while working in I-PERFORM.</p>
Printing	The printed evaluation does not show all information and/or looks bad.	See page 39 of the I-PERFORM User Guide.
Error HTTP404; Web Page Not Found		<p>Why: Currently the state systems, I-PERFORM, ATS, and others, do not support versions above 8.</p> <p>Do: Check to see what version of Internet Explorer the system is using. Revert back to an earlier version until the new version is tested and ready for use.</p>
Cannot forward the evaluation to someone else	The only option to forward an evaluation to someone else is "Forward to Employee".	<p>Why: Other users are not listed in the routing process.</p> <p>Do: Contact your agency's I-PERFORM Administrator. They will need to add names to the reviewer role list. Once done, the names will be listed in the list box at the top of the screen.</p>
Message "No Current Evaluation Found"	This message may be received when performing salary actions. After checking you find there was a current evaluation submitted.	<p>Why: If your browser was on IE9 or 10 when the evaluation was created an incorrectly entered date will not be caught by I-PERFORM. A year entered as 0011 – 0012 will be allowed to stay and therefore posted to IPOPS with the same date that will not be recognized as 2011 – 2012.</p> <p>Do: Contact DHR. The evaluation must be reset to Draft Status and resubmitted overnight to IPOPS.</p> 

I-PERFORM Glossary

Agency Goals	Statements describing what an agency intends to accomplish, stemming from the agency's strategic plan.
Developmental Objectives	Specific actions related to training and educational needs that are included in the development plan.
Documentation	A record of employee performance and behavior.
Effectiveness	The degree to which an individual, organization, or group produces a desired result.
Efficiency	The degree to which an individual, organization, or group produces a desired result (productivity) with a minimum expenditure of time, effort, money, or resources.
Employee Development Plan	A documented form of shared discussion where managers or supervisors work together with subordinates to identify objectives, resolve performance-related concerns and determine and create an appropriate development plan designed to stimulate an individual's professional growth by increasing his or her skills, knowledge or abilities(i.e.: training, education).
I-PERFORM	A web-based performance management tool developed for State of Idaho employees.
Key Responsibilities	Primary functions of an employee's job.
Mission	The expression of an organization's vision.
Objectives or Goals	Short-term, measurable steps within each key responsibility that clarifies performance expectations.
Performance Evaluation	An assessment of an employee's performance based on established expectations for the position.
Performance Expectations	Describes desirable level of competence an employee would be demonstrating at a particular level.
Performance Improvement Plan	A formal process designed to facilitate constructive discussion between a subordinate and his or her supervisor and to clarify the work performance to be improved. The performance improvement plan, or PIP, as it is sometimes called, identifies performance and/or behavioral issues that need to be corrected and creates a written plan of action with time frames to guide the improvement and/or corrective action.
Performance Management	A strategic and integrated approach to increasing agency effectiveness by planning, assessing, and measuring both employee and agency performance.
Performance Measurement	The ongoing monitoring and reporting of program accomplishments, particularly progress toward agency goals.
Performance Measures	A quantitative or qualitative process for evaluating progress toward agency goals.
Performance Summary	A narrative explanation of the overall performance of an employee.
Rating Levels	An assigned level of evaluated performance (Exemplary, Solid, Achieves).
Strategic Plan	A document that outlines the long range goals of an agency in support of achieving its mission and vision.

Phase 2 Planned Enhancements

The following enhancements are planned to be completed by June 30, 2013. The process being used is to, based on priority, complete and implement on an ongoing basis. Items indicated with a check mark have been implemented as of the date of this document.

Enhancement
<input checked="" type="checkbox"/> Option for draft evaluation after employee review.
<input checked="" type="checkbox"/> Save as PDF – to print evaluation.
<input checked="" type="checkbox"/> Ability to add agency goals and objectives to employee performance evaluations.
<input checked="" type="checkbox"/> Supervisor’s folder for each employee.
<input type="checkbox"/> Email notification to supervisors when employee evaluations are due and reminders
<input type="checkbox"/> Position templates.
<input type="checkbox"/> Auto populate goals, developmental goals, objectives, key responsibilities from prior year evaluation.
<input type="checkbox"/> Levels of administrative access and an HR routing option.
<input type="checkbox"/> Reports: standard reports and ad hoc reports through IBIS.
<input type="checkbox"/> Edit in place to ensure appropriate evaluation is submitted for probationary periods .