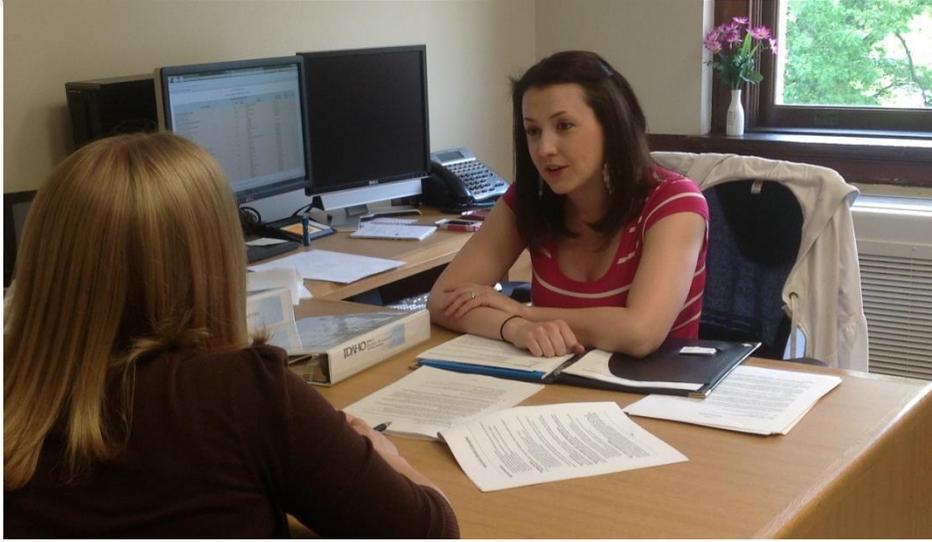


I-PERFORM
Performance Management System



Supervisor Guide



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 or email- iperformhelp@dhr.idaho.gov. 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 347
Boise, ID 83720-0066

(208) 854-3080
iperformhelp@dhr.idaho.gov



Our focus today!

I-PERFORM Supervisor 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><u>Adaptability/Flexibility:</u> This describes how well the employee adapts to change and is open to different and new ways of doing things. <u>Dependability:</u> This describes how well the employee completes assigned work in a timely manner. The employee meets attendance requirements. <u>Interpersonal Skills:</u> 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. <u>Quality:</u> This describes the employee' work in terms of consistency, thoroughness, and accuracy. <u>Work Environment/Safety:</u> 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><u>Adaptability/Flexibility:</u> This describes how well the employee adapts to change and is open to different and new ways of doing things. <u>Dependability:</u> This describes how well the employee completes assigned work in a timely manner. The employee meets attendance requirements. <u>Productivity:</u> 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><u>Adaptability/Flexibility:</u> This describes how well the employee adapts to change and is open to different and new ways of doing things. <u>Customer Service:</u> This describes how well the employee works with internal and external customers to achieve desired results and maintain positive relationships. <u>Interpersonal Skills:</u> 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. <u>Work Environment/Safety:</u> 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>

I-PERFORM Supervisor User Guide

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.

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.



I-PERFORM Supervisor 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 on 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
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 employee.)
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 sent by supervisor 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 	<ul style="list-style-type: none"> View/edit routing structure based on agency structures Add agency-wide performance expectations Add agency goals
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 Relay programming issues to SCO 	<ul style="list-style-type: none"> View all performance evaluations Return performance evaluations to draft status

I-PERFORM Supervisor User Guide

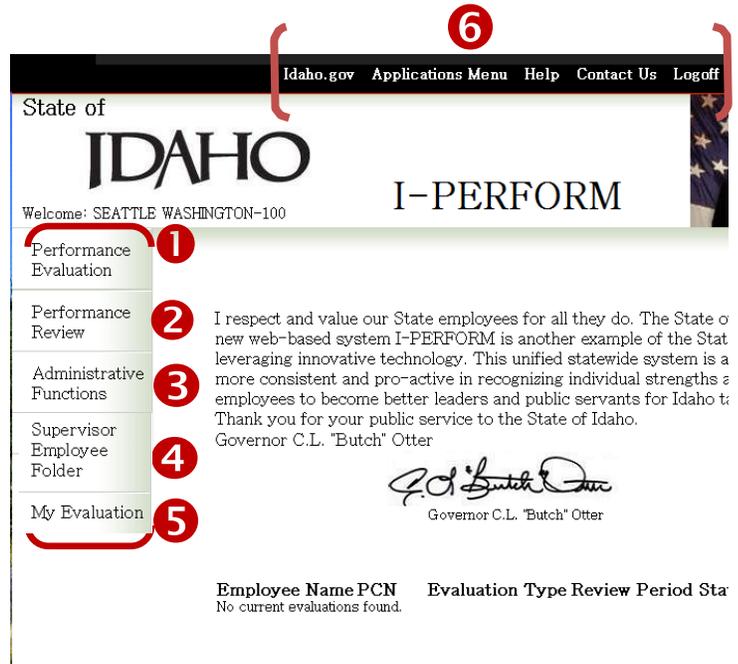
Access I-PERFORM

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.



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.

Using I-PERFORM: *Supervisors*

Immediate supervisors responsible for completing employee performance evaluations use I-PERFORM to create and route a draft evaluation for each employee.

Locate Current Evaluations

Once logged into I-PERFORM, create the evaluation:

1. Click on **Performance Evaluation**.
2. Select your **Location** from the list box by clicking on the arrow.
3. Click on the **Employee Name** for whom you wish to create the evaluation.
4. Looking through the list you may see multiple evaluations for one employee. You cannot edit one that has already been "**Transmitted**", meaning the data has been uploaded into IPOPS.
5. If there is an evaluation that has a "Draft" status, you may open it and continue working.
6. To open an evaluation, click on the **name** associated with the specific evaluation you want to view.

State of IDAHO I-PERFORM

Welcome: SEATTLE WASHINGTON-100

Performance Evaluation

Select Personnel Management Location: [Dropdown]

Select Employee Name: [Dropdown]

Select PEL Location: [Dropdown]

Evaluations

State of IDAHO I-PERFORM

Welcome: SEATTLE WASHINGTON-100

Performance Evaluation

Select Personnel Management Location: ROUTING FOUR

Select Employee Name: [Dropdown]

Evaluations

Employee Name	PCN	Evaluation Type	Review Period	Status
BART DAVIS	100-9090	Annual Review	06/03/2013-06/14/2013	Draft

If you need additional assistance or have questions on these supervisory procedures, please click on the help button.

! If an evaluation was completed and transmitted in error, contact: Agency HR Representative.

! Creating a new evaluation for the first time in I-PERFORM will take more time than normal. This is due to the fact that there is no way of importing data from a previous evaluation created outside of I-PERFORM. Therefore, you will need to spend more time in these areas:

- **Objectives** – Previous/Current Year and Next Review Period
- **Goals** – Previous/Current Year and Next Review Period

To add the information you will need to either:

- **Copy and paste** from another document into NOTEPAD and then into I-PERFORM, or
- **Attach** another document and refer to the attachment in the Objective and Goal fields.

I-PERFORM Supervisor User Guide

Create a New Evaluation

1. After logging into I-PERFORM, select the correct **Management Location** from the list.
2. Select the **Name of the Employee** for whom you wish to create the evaluation.
3. The box below the employee name will auto populate with their I-PERFORM evaluation history. If no evaluation has been created in I-PERFORM, no history will be listed.
4. Click on **Create Evaluation** at the top of the screen.
5. Most information will prefill; verify accuracy.
6. Complete the field for **Division/Unit**.
7. Enter the **From** and **To Dates** for this evaluation period. *Note: The dates and type of review are required before the evaluation can be routed. Check with your agency HR Representative if you are unsure of the review period dates.* Click on the links to choose dates from the calendar.
8. Select the appropriate **Type of Review**.
9. **After completing the evaluation** reflect on all comments and ratings to determine and select the **Overall Rating**. You will come back to this screen after completing the *Performance Summary*.
10. **SAVE before moving to the next tab.**

State of IDAHO I-PERFORM

Welcome: SEATTLE WASHINGTON-100

Select Personnel Management Location: ROUTING FOUR

Select Employee Name: BART DAVIS-100-9090

Employee Name	PCN	Evaluation Type	Review Period	Status
No current evaluations found for pcn 9090.				

If you need additional assistance or have questions on these supervisory procedures, please click on the help button.

Create Documentation Add Attachments Delete Attachments Spell Check Send To Select Next Reviewer Save Exit Print Preview Help

State of Idaho Senate Employee Performance Evaluation

Employee Name: DENVER C COLORADO Job Title: SENATORS

PCN: 9090 Division/Unit:

Supervisor/Manager: SEATTLE WASHINGTON-100

Review Period: From Date (mm/dd/yyyy) To Date (mm/dd/yyyy)

Type of Review:

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

Signature Section:

Employee Signature Date



Move to
Performance
Objectives

I-PERFORM Supervisor User Guide

Performance Objectives

1. Record the **Key Responsibilities**, the primary function of the employee's job for this individual.
2. Enter the **Objectives** that were assigned during the last evaluation period, or if this is the first for this employee, enter the new objectives.
3. During the year, track progress toward the objective. Reflect on the performance during the review period toward the assigned objectives. Add final **comments** beneath each objective.
4. Complete the **Review of Prior Year Employee Development Plan** section. As with objectives, for the first time you will populate the Developmental Objectives that were established at the end of the last review period, or if they are a new employee, at the beginning of their employment. Goals and Objectives for the NEXT evaluation period will be added on *the Performance Summary tab*. Developmental Objectives should be designed to increase an employee's professional growth by increasing knowledge, skills, and/or abilities.
5. Add comments regarding progress toward the objective goals.
6. Click **SAVE**.



You can keep up with your spell check by clicking the red check mark on each comment field. Alternatively, you can check the entire document at once using the main tool bar at the top of the screen.

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

State of Idaho
Senate
Employee Performance Evaluation

Employee Name: BART DAVIS Job Title: SENATORS
PCN: 9090 Division/Unit:
Supervisor/Manager: SEATTLE WASHINGTON-100
Review Period: From Date (mm/dd/yyyy) 06/03/2013 To Date (mm/dd/yyyy) 06/14/2013

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

1

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.

Add Prior Year Performance Objective

Prior Year Objective #1:
Due Date:
Objective Description
Status Update (Date) Percentage Complete:
(Comment)

2

3

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

4

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

Add Prior Year Development

Delete Objective #1

Prior Year Development Objective
Due Date
Objective Description
Performance Measurement:
Status Update (Date) Percentage Complete:
(Comment)

5



Move to
Performance
Expectations

Performance Expectations

1. If you are not familiar with the statewide **Performance Expectation** ratings, review the descriptions of the levels of *Exemplary Performance*, *Solid Performance*, and *Achieves Performance* for each performance standard.



The descriptions are examples and are intended to provide you guidance on the differences between each rating level. Each bullet does not have to be demonstrated by the employee to warrant the rating. Use your agency's role-specific expectations for clarity.

2. If desired, click **Hide Expectation** to hide the detail describing each rating while on that page.
3. Based on the employee's performance during the entire evaluation period, assign an appropriate **rating** to each expectation, according to your agency's process by clicking the associated button.
4. If desired, you may click **Hide Rating**. This may be used by agencies that only assign an overall rating, and do not assign ratings for each category. Contact your agency HR representative to discuss this option.
5. **Add Comments** that justify the assigned rating. **Comments on each expectation are required in I-PERFORM.**
6. If there is any documentation that you have assigned to this performance expectation it will show in the *Documentation* field. See next page to create/handle documentation.
7. Continue working through the rest of the Performance Expectations in the same manner.

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

State of Idaho
Senate
Employee Performance Evaluation

Employee Name: BART DAVIS Job Title: SENATORS
PCN: 9090 Division/Unit:
Supervisor/Manager: SEATTLE WASHINGTON-100
Review Period: From Date (mm/dd/yyyy) 06/03/2013 To Date (mm/dd/yyyy) 06/14/2013

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.

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

2 **Hide expectation**

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
- Continuously looks for improvements and looks for opportunities to provide better service
- Anticipates problems and takes necessary corrective action to prevent or lessen consequences
- Accepts new, different, or changing work requirements or procedures
- Resolves conflict situations promptly and appropriately while remaining open to discussion
- Models proper work ethics and practices

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

State of Idaho
Senate
Employee Performance Evaluation

Employee Name: BART DAVIS Job Title: SENATORS
PCN: 9090 Division/Unit:
Supervisor/Manager: SEATTLE WASHINGTON-100
Review Period: From Date (mm/dd/yyyy) 06/03/2013 To Date (mm/dd/yyyy) 06/14/2013

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.

4 **Show expectation**

5 **Hide rating**

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 180, 152, and 153.
 NA Not Applicable

COMMENTS

6 **DOCUMENTATION**
Date Comments



**Move to
Create
Documentation**

I-PERFORM Supervisor User Guide

Create Documentation

1. Click on **Create Documentation** on the menu bar. A new window will open.
2. Provide a BRIEF **description** of the event. Make this a short-name. Details will follow.
3. Identify the **details of the event**; when the event took place, where it occurred, who was present, the outcome, impact to the agency, relationship to the performance expectation and the policies and procedures, when you talked to them about the event, the follow up required, consequences, and suggestions for improved or continued performance. Continue to scroll down for each area; it is not a requirement to use all areas.
4. **Check Spelling.** Remember you can do this in each field or check the entire document at one time.
5. If you wish, you can **link the documentation** from the menu bar that displays in the new window. Select one of the performance expectation categories from the **Add Link to Evaluation** drop-down list. Once you have selected the category, click on **Add Link to Evaluation**. The documentation will appear in the evaluation with the assigned performance expectation. *The Link to Evaluation field is ONLY available when the documentation is initially created.*
6. Click **Save as Draft** if you wish to continue working on the comments, OR
7. **Save as Completed** if you are done with the comments. All documents must be complete before being routed for review.
8. You can view, review, or edit the documentation from the *Audit/Attachment* tab.
9. Under *Documentation*, click on the **date of the desired document** to open. The documentation will now also show on the main page of I-PERFORM.



Use this Documentation tool for **positive** as well as **negative** feedback. You can use it while writing the evaluation or capture notes all year long for easy recall and access. **NOTE** – the documentation and attachments are visible by the employee once the evaluation is finalized, and is discoverable.

1 4 8 9

7 6 2 4 3

5

For notes that you **DO NOT** want the employee to see, use the [Supervisor Employee Notes](#) function described on pages 23 - 26 instead.

I-PERFORM Supervisor User Guide

Add Attachments

In addition to creating documentation during the year, or at the time of the evaluation, supervisors can also add attachments to the online file in I-PERFORM. These will be available for reference as you finalize an evaluation and will remain attached to the evaluation.

1. Click on **Add Attachments** in the main toolbar; a new window will open.
2. Create a **documentation title** that will help you determine where to utilize the comments within the evaluation document.
3. **Browse** for the file, it can be any type of file.
4. Click **Save & Close**.
5. You will now be able to see and open the attachment by clicking on the *Audit/Attachments* tab.
6. To open the attachment click on the **attachment name**.



Like documentation, these are visible by the employee once the evaluation is complete, are also discoverable.

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

Supervisor/Manager: I-PERFORM - Windows Internet Explorer

Review Period:

The following rating is three levels: Achieves and employee during 1 in describing what add intended to be all inch

PERFORMANCE EXPECTATION
performance expectation others.

EXEMPLARY PERFORMANCE
Employee meets and exceeds such as:

- Employee is recognized
- Exceptional quality
- Assigned to special
- Tracks trends on consumer and anticipates needs 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 supervisor 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

SOLD 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

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

Employee Name: DENVER CO 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

Documentation:

Date	Comment	Status
11/07/2012	Problem Solved!	Complete
11/09/2012	Feedback Received	Complete
11/08/2012	Feedback from the Director	Complete
11/09/2012	Link this to professionalism	Draft
11/09/2012	2nd link to professionalism	Draft

Status: Draft
Originator: SEATTLE WASHINGTON-100
Current Approver:
Last Routed:

Timestamp:
11/07/2012 09:37:13 AM
11/07/2012 10:43:17 AM

Audit Trail:
SEATTLE WASHINGTON-100 - Created
SEATTLE WASHINGTON-100 - Saved as Draft

Return to Supervisor for Comments:

Date	Comment	Reviewer
------	---------	----------

Attachments:

Attachment Name
Feedback from ITD

I-PERFORM Supervisor User Guide

Supervisor Employee Folder

Added to I-PERFORM as part of Phase II, the supervisor employee folder allows supervisors to keep documentation throughout the year, which can either be:

1. Attached to a current evaluation. When the evaluation is marked complete the note will be visible by the employee.
2. Added to the notes, never visible by the employee.

As with all documentation, remember that it should be written for a juror's eyes – fair, consistent, and objective. It is important that it creates credibility for the manager and shows consistent treatment of employees.



1. **Describe expectations presented to the employee.** Employees should know what their supervisor's expectations are. These may be performance standards, company standards, and policies and procedures. Employees can generally find these expectations in job descriptions, written performance goals, ethics statements, attendance policies, and in employee handbooks. They should have been discussed, and understanding of them achieved.
2. **Describe the behavior or performance that must change.** Here, the documentation should describe the "performance gap": the difference between desired behavior (expectations) and the actual conduct. It is critical that supervisors focus on the conduct at issue, not the person. Provide only the facts and avoid interjection of opinion or assumptions. Be careful when using legal terms or conclusions in the documentation. For example, a supervisor should not write that an employee was "drunk" at work. Instead, the manager should describe the behavior (i.e., slurred words, stumbling, etc.) and what action was taken (i.e., the employee was referred for a blood test). Professional and effective documentation provides a description of fact, not a diagnosis or judgment.
3. **Include the employee's explanation.** First, ensure that the employee understands why the behavior or performance must change and how the gap affects overall operations. As a matter of fairness, the employee should be given an opportunity to explain why the behavior is occurring or why a performance standard is not being met. This can provide the employee's supervisor an opportunity to help the employee correct the problem and "ties" the employee to his or her story.
4. **Detail action plans and goals.** Note the steps the employee will take and the steps the supervisor will take to help the employee achieve the desired results. Reach an agreement with the employee on these plans and goals.
5. **Describe the potential consequences.** Let the employee know what will happen if the behavior or poor performance continues.
6. **Include a time expectation for correcting the behavior.** The time can be a general time frame, such as by the next meeting, or it can be a specific time, such as within one month. If the manager sets a specific time, such as 30 or 60 days, the manager must follow up at the end of the time period.
7. **Discuss and complete the follow-up.** This step is critical to effective documentation and the overall performance improvement process. Here, the manager should note the results of the action plan and whether goals have been met or amended.

*Adapted from 7 Bullet-Proof Rules for Documentation, HR.BLR.com
June 30, 2009 Patricia M. Trainor, J.D., Legal Editor*

I-PERFORM Supervisor User Guide

Create Supervisor Employee Notes

Access the Supervisor Employee Folder from the I-PERFORM Main Screen.

1. Click on **Supervisor Employee Folder** from the home screen.
2. Select the appropriate **location**.
3. Select the **employee** for whom you would like to document performance.
4. Click on **Create Supervisor Notes** at the top of the screen in the menu bar.
5. You can view any created notes or documentation by clicking on the appropriate item from the list.

State of IDAHO I-PERFORM

Welcome: SEATTLE WASHINGTON-100

Performance Evaluation (1)

Performance Review

Supervisor Employee Folder

My Evaluation (5)

Select Personnel Management Location: ROUTING FOUR (2)

Select Employee Name: BART DAVIS-100-9090 (3)

Last Modified	Description	Note Type
5/28/2013 9:00:25 AM	Try #3	documentation
5/28/2013 9:00:26 AM	Attendance	Notes
5/28/2013 9:00:26 AM	dfasdf	attachment
6/18/2013 9:18:40 AM	attendance	Notes

If you need additional assistance or have questions on these supervisory procedures, please click on the help button.



- ✓ Effective documentation should be created at or close to the time of the incident.
- ✓ Documentation should also include the date (with the year) and the employee's full name at least once (after that initials can be used).
- ✓ If possible, the manager or supervisor should obtain the employee's signature to verify the discussion.

I-PERFORM Supervisor User Guide

This screen will allow you to enter either:

- a. **An attachment:** any document existing outside of I-PERFORM that you would like to import to serve as documentation. This would be visible to the employee when the evaluation is marked complete.
- b. **Documentation:** any information that you would like shared with the employee once the evaluation is marked complete.
- c. **Notes:** any information that you would like to retain as part of the employee record. This information is like all documentation and can be used in court. It is NOT visible to the employee unless you mark it for the specific evaluation. **No documentation should be a surprise to an employee.**

6. Select the **desired type**.
7. Add a **BRIEF Description** of the situation.
8. Create your **Notes**, following the guidelines discussed at the beginning of this document.
9. Click **SAVE**. The window will close and you will be returned to the Main Screen.
10. The note will now display on the main screen under the associated employee. Click the **date** to view the note.

State of Idaho
Senate
Employee Performance Supervisor Notes

Employee Name:	BART DAVIS	Job Title:	SENATORS
PCN:	9090	Division/Unit:	
Supervisor:	SEATTLE WASHINGTON-100	Date:	07/18/2013

Type: Attachment

Brief Description:

Attachment:

Title:

Attach new file here:

Browse...

State of Idaho
Senate
Employee Performance Supervisor Notes

Employee Name:	BART DAVIS	Job Title:	SENATORS
PCN:	9090	Division/Unit:	
Supervisor:	SEATTLE WASHINGTON-100	Date:	07/18/2013

Type: Notes

Brief Description:
Time and Attendance 7/13/13

Category: Feedback on Performance

Notes:
Bart is scheduled to work from 8:00 - 5:00. He arrived today at 8:15. He did not offer an explanation. I asked him what happened and he stated he had car problems. I told him I expect him to call when something happens that causes him to be late. He stated he would.

State of IDAHO I-PERFORM

Welcome: SEATTLE WASHINGTON-100

Performance Evaluation

Performance Review

Supervisor Employee Folder

My Evaluation

Select Personnel Management Location: ROUTING FOUR

Select Employee Name: BART DAVIS-100-9090

Last Modified	Description	Note Type
4/17/2013 4:32:13 PM	dfasdf	attachment
4/17/2013 4:41:44 PM	Try #3	documentation
5/21/2013 3:31:44 PM	Attendance	Notes
6/18/2013 9:18:40 AM	attendance	Notes
7/5/2013 3:10:11 PM	fgsdf	Notes
7/18/2013 9:16:54 AM	Time and Attendance 7/13/13	Notes

If you need additional assistance or have questions on these supervisory procedures, please click on the help button.

I-PERFORM Supervisor User Guide

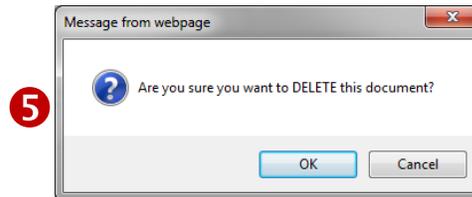
Delete a Note

1. Click on **Supervisor Employee Folder**.
2. Select the appropriate **location**.
3. Select the **employee** for whom you would like to document performance.
4. In the field marked **Employee Notes** will be a list of all previously created notes. Select the note you wish to delete; click on the **date** to open the note.
5. A message displays to verify your intent to delete the note. This action cannot be undone. If you wish to continue, click **OK**.
6. The window will close and you will be returned to the Main Screen.



**Move to
Performance
Summary**

Last Modified	Description	Note Type
1/24/2013 1:26:52 PM	Time and Attendance	notes



I-PERFORM Supervisor User Guide

Performance Summary

1. Click on the **Performance Summary** tab.
2. Enter **comments** that describe the employee's overall performance in the **Summary** field. Consider all of the expectation areas, ratings assigned, documentation, and other comments. Comments should be specific and reflect all sections of the evaluation.
3. Below the *Performance Summary* fields you will see **Agency Goals and Performance Objectives for Next Review Period**. This section is for planning the upcoming evaluation period. The template designed into I-PERFORM allows you to articulate, and document, the expectations and developmental objectives for each of your employees. When creating goals, be certain to connect the individual's goals with the strategic goals of the agency/division/department. Through many employee engagement surveys conducted employees want to know their job matters; that they make a difference to the overall success of the organization. It is a prime motivator.
4. **Select the agency goal** you would like to set as an expectation from the drop-down list. You may add/delete goals, as described in this section. Once the agency-wide goal is selected another field will open for you to enter the objective(s) as related to the goal and the job of the employee. To add additional objectives click on Add Performance Objectives. Add the due date for the objective. Make this date realistic. If it is long-term or continuous, you can use the status updates dates for setting and following up on milestones. When you meet with the employee to determine their progress toward the goal, enter the date of the update.
5. Use the **Employee Development Plan** to insert development objectives which will guide the employee for the next review period.

The screenshot shows the 'Performance Summary' tab of the I-PERFORM system. At the top, there are navigation buttons: 'Cancel', 'Print Preview', and 'Help'. Below these are tabs for 'Performance Cover Sheet', 'Performance Objectives', 'Performance Expectations', 'Performance Summary' (which is selected), and 'Audit/Attachments'. A red circle with the number '1' points to the 'Performance Summary' tab.

The main content area is titled 'State of Idaho RO Senate Employee Performance Evaluation'. It contains a table with the following information:

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

Below the table is a section titled 'PERFORMANCE SUMMARY'. It includes a text area for a summary, with a red circle '2' pointing to it. Below that is a section for 'AGENCY GOALS AND PERFORMANCE OBJECTIVES FOR NEXT REVIEW PERIOD', with a red circle '3' pointing to it. This section includes a dropdown menu for selecting goals, with a red circle '4' pointing to it. Below the dropdown is a section for 'Employee Development Plan', with a red circle '5' pointing to it. This section includes a 'Create New Development Objective' button and a form for entering a development objective, with a red circle '5' pointing to the form. The form has fields for 'Development Objective #1:', 'Due Date:', and 'Objective Description'. At the bottom of the form, there are fields for 'Status Update:(Date)' and 'Percentage Complete:'.

I-PERFORM Supervisor User Guide

Route the Performance Evaluation

Routing the document is basic in its concept. Depending on your agency's policies and procedures you may have one person to route the document to for review, or you may have multiple, generally including your supervisor and HR. Following is the basic routing process, which can be very dynamic depending on the comments of the reviewer and manager, and the processes the agency has put in place. The reviewer's process is discussed later in this document.



1. Review each tab of the review to ensure that all are complete, including any added documentation.
2. When ready to send the DRAFT evaluation click on the **drop-down list for Select Next Reviewer**.
3. Select the **person you want to send the evaluation to first**, following your agency's process. If a specific reviewer name is not listed, check with your HR representative, who also serves as the administrator for I-PERFORM.
4. Click **Send To**.
5. A system-generated email will be generated to the reviewer to complete their review of the performance evaluation, add comments, and return to you. Comments from the reviewer will be returned via email. To understand the entire review process, see the [Reviewer User Guide](#) for the step-by-step detail. See [page 7](#) for additional information on the reviewer role.
6. When the reviewer returns the evaluation you will again open the evaluation to read their comments, if any. To make changes navigate to the appropriate location and make the changes. **SAVE**.
7. Return it to the reviewer for final approval.
8. Depending on your agency's process, this may require sending and resending to each reviewer each time the document is changed.
9. When the reviewer is done with their review they will route it back to you with one of two possible statuses; [Draft or Review Complete](#).
10. Watch the I-PERFORM evaluation status area and your email to see when it is complete.

4

2

3

Create Documentation Add Attachments Delete Attachments Spell Check Send To Select Next Reviewer Save Delete Exit Print Preview Help

Performance Cover Sheet Performance Objectives Performance Summary Audit/Attachments

ROUTING FOUR

Select Next Reviewer

ADA COUNTY-100

State of Idaho
Senate

Employee Performance Evaluation

Employee Name: DENVER C COLORADO Job Title: SENATORS

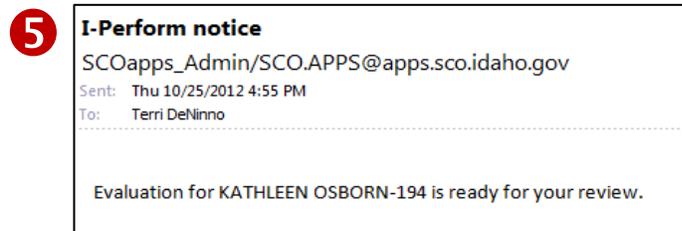
PCN: 6090 Division/Unit: DHR

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



This process could become cumbersome. Avoid this by having a conversation with the reviewer to discuss questions, comments, and/or concerns BEFORE initiating the routing process.

This way, the reviewer will be able to simply mark the evaluation as complete.

I-PERFORM Supervisor User Guide

After the Review of the Evaluation Draft

1. When all reviews are done and the evaluation draft is ready, print the evaluation for use during your face-to-face meeting. Select **Print Preview**. A new pop-up box displays.
2. If the formatting is off, follow the steps outlined in the [General Navigation](#) section of this document. When ready to print, select **Print**.



The document is still considered a draft at this point.

Working collaboratively with the employee and your manager will allow the best opportunity to make the evaluation meaningful for all involved. See the next pages for further descriptions for sending the evaluation to the employee.

3. Click **Cancel** after printing to close the box.
4. After meeting with your employee make any agreed-upon changes. Route to your supervisor and/or other reviewers as designed by your process.
5. When all reviews are complete the last reviewer will click on **Review Complete**. This will add electronic signatures to the evaluation of the reviewer and the supervisor.
6. Send to employee for their final comments and signature by clicking on **Ready for Employee**. At this point you COULD return it to draft status.
7. The status will now show as *Employee Review* on the home screen.
8. The employee will receive an email and complete their comments and add their electronic signature. When the employee has either signed or refused to sign the evaluation will be automatically forwarded to the Appointing Authority, if used, for their signature. If an Appointing Authority is NOT used, the evaluation is marked Complete.

1

Ready for Employee		Exit	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:				
<input checked="" type="radio"/> Annual Review <input type="radio"/> Entrance Probation <input type="radio"/> Promotion Probation <input type="radio"/> Transfer <input type="radio"/> Separation from State Service <input type="radio"/> Other				
Overall Rating: This document is an evaluation of the employee's performance since the last evaluation.				
<input checked="" type="radio"/> 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.				

6

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					
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					

2 3

Print Instructions	Print	Cancel	Help
 State of Idaho 100 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			
Overall Rating: This document is an evaluation of the employee's performance since the last evaluation.			
EX			
EMPLOYEE COMMENTS: Please note: If you have questions or concerns regarding the content of your evaluation, "sign" the evaluation or "refuse to sign" the evaluation, instead contact your supervisor to discuss. Also, if you need space for your comments, please contact your supervisor.			
SIGNATURE SECTION:			
DENVER COLORADO-100		11/16/2012 1:41:22 PM	
Employee Signature			Date
<i>(Signature acknowledges discussion of evaluation, but does not necessarily imply agreement.)</i>			
SEATTLE WASHINGTON-100		11/16/2012 11:11:26 PM	
Supervisor Signature			Date
<i>(Signature acknowledges that this evaluation and key responsibilities have been discussed with the employee.)</i>			
ADA COUNTY-100		11/16/2012 9:53:31 AM	
Reviewer Signature			Date

5

Choices for Sending to Employee

There are a couple of ways you can approach preparing for your meeting with the employee once the review process is complete. This section outlines both options.

Not sending to the Employee prior to Meeting

1. When all reviews are done and the evaluation draft is complete, print the evaluation for use during your face-to-face meeting.
2. Select **Print Preview**.
3. If the formatting is off, follow the steps outlined in the General Navigation section. When ready to print, select **Print**.
4. Click **Cancel** after printing to close the box.
5. Meet with the employee. If changes have been agreed to, make the changes in I-PERFORM and follow the routing process again as described in this document.
6. Select **Ready for Employee**.
7. The employee opens the evaluation and adds comments to the cover sheet and sign or refuse to sign the evaluation.



1. When all reviews are done and the evaluation draft is complete, select **Ready for Employee**.
2. The screen closes, and the evaluation is sent to the employee.
3. The employee opens the evaluation and begins reviewing the ratings and comments. They can now also add comments to the cover sheet and **Sign or Refuse To Sign** the evaluation.
4. Meet with the employee. If changes have been agreed to, make the changes in I-PERFORM by first selecting **Return to Draft Status**.
5. You will receive a notification indicating that the signatures will be erased and returned to draft status, and asking for you to select **OK** or **Cancel**. The Audit/Attachments tab will reflect the change.
6. Make the changes in I-PERFORM and follow the routing process again as described in this document.



The difference in these two methods is when the employee can see the evaluation and have the ability to add comments and sign or refuse to sign the document. Consider the impact of the employee seeing the evaluation before you have had a chance to meet with them. If you have had ongoing conversations about their performance, the latter process would not be an issue.

I-PERFORM Supervisor User Guide

Return to Draft Status & Status Descriptions

Supervisors have the ability to return an evaluation to a draft status depending on the current status and the stage the evaluation is in within I-PERFORM. Returning to draft status does not delete information already typed in the evaluation but simply erases the reviewer and/or supervisor signatures from the cover page. **The supervisor can return the evaluation to draft status UNLESS the evaluation is in 'Pending Review', 'Complete', or 'Transmitted' status.**

There are several stages of the performance evaluation routing process:

Draft Status	Draft Status indicates the performance evaluation is still in the hands of the supervisor. It will remain in a draft status until the supervisor either sends it for review or sends it to the employee. Anything on the evaluation can be changed by the supervisor at this stage.
---------------------	--

Pending Review	Pending Review indicates the performance evaluation has been routed from the supervisor to any pre-determined reviewers as indicated per agency process. The evaluation will remain in this status until the reviewer routes it back to the supervisor with any comments. While in this stage the supervisor is only able to view and print until rerouted back to the supervisor from the reviewer.
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Pending Supervisor	Pending Supervisor status indicates that the reviewer has returned the evaluation to the supervisor to make suggested changes or to route it to another reviewer in the process. Changes on the evaluation can be made by the supervisor at this stage.
---------------------------	--

Review Complete	Review Complete indicates that the final reviewer in the agency's process has reviewed and approved the contents of the evaluation, and had agreed the review is now ready to be shared with the employee. The supervisor may return the evaluation to draft status which erases the reviewer's signature. The routing of the evaluation to the reviewers would start over.
------------------------	---

Employee Review	Employee Review indicates the evaluation has been forwarded by the supervisor to the employee to review and provide their comments and electronic signatures.
------------------------	--

Awaiting Final Approval	Each agency has the option of utilizing a role called Appointing Authority. When a person is designated into that role, they must review and provide final approval of all agency evaluations before it can be uploaded into the DHR Performance Evaluation application.. If the status indicates Awaiting Final Approval, the designated Appointed Authority has not yet completed this action.
--------------------------------	--

Complete	Complete Status indicates that the all signatures have been added and the evaluation is final. To make changes on the evaluation contact your agency HR Representative.
-----------------	--

Transmitted	Transmitted Status indicates that the evaluation has been uploaded to DHR Performance Evaluation application.
--------------------	--

Tips: 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.

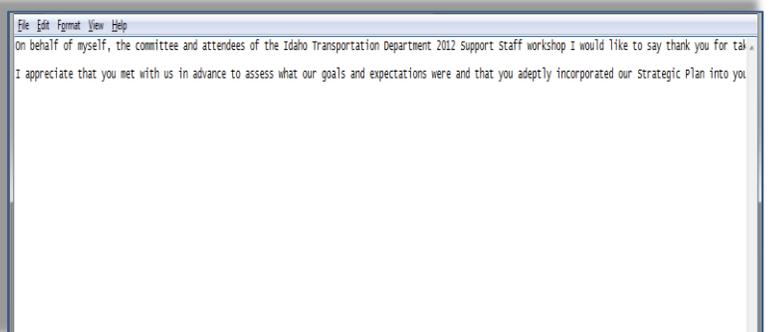
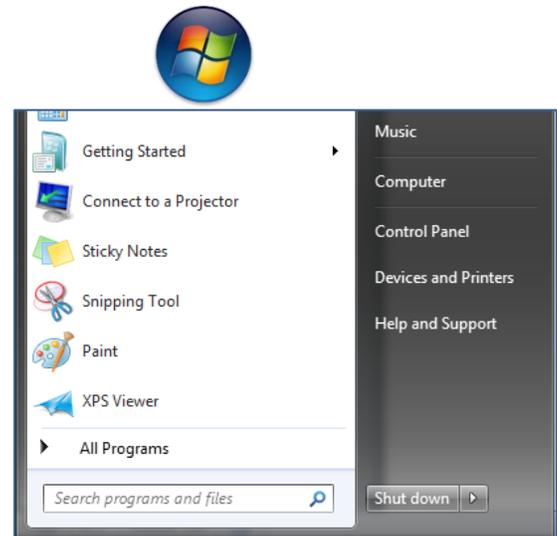
KEY RESPONSIBILITIES:

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.

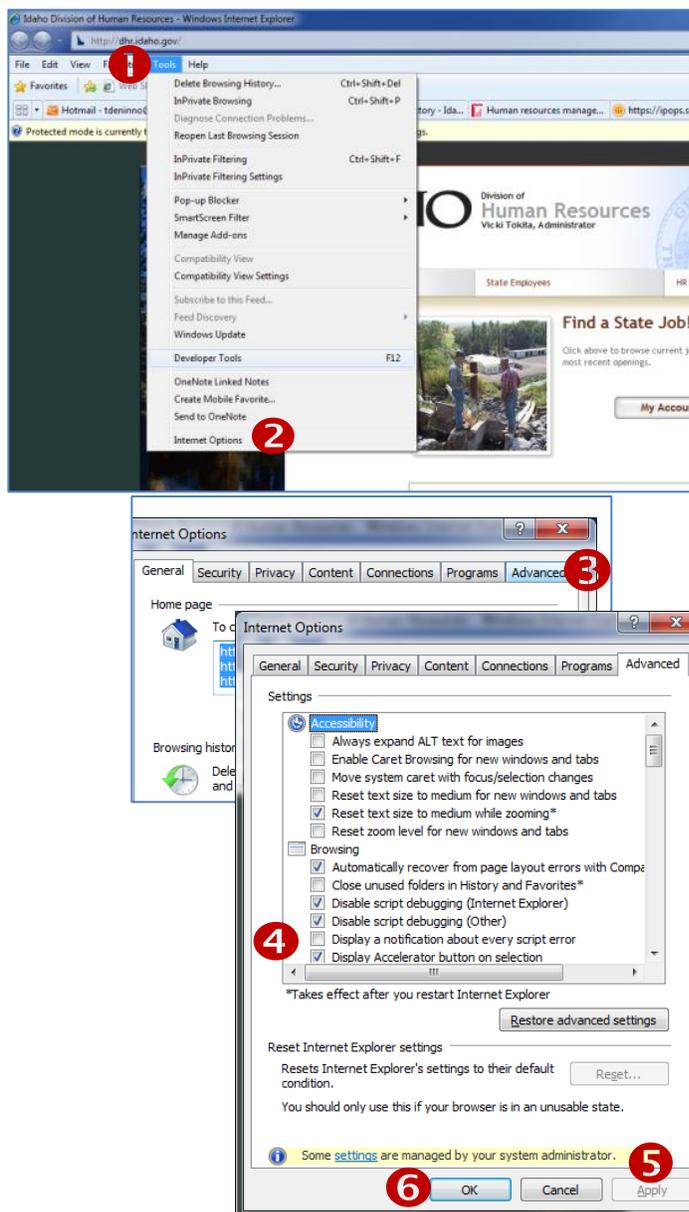


Help: Allowing/Showing Error Pop-Ups

Understanding errors that are occurring in I-PERFORM are important to DHR and SCO so that they 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 the settings to display the errors:

1. Open 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'.
7. Press PrtScn on your keyboard to create a screen capture of the display.
8. Either paste the screen capture into the body of an email or a Word document.
9. Send an email with a description of the situation along with the screen capture and/or Word attachment to iperformhelp@dhr.idaho.gov.



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, Does Not Achieve).
Strategic Plan	A document that outlines the long range goals of an agency in support of achieving its mission and vision.