STATE OF IDAHO

DIVISION OF HUMAN RESOURCES

I-PERFORM USER MANUAL

REV: 4/3/2012

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 will 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 (HR) Focus Group.

If you experience any problems with this application please contact your agency I-PERFORM system administrator or the Division of Human Resources. If you have any problems with this help manual please contact the Division of Human Resources.

Division of Human Resources
304 N. 8th Street
Boise, ID 83720-0066
(208) -854-3080
iperformhelp@dhr.idaho.gov

Performance Management Best Practices

Good 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.

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 by motivating and encouraging employees to be productive contributors to the mission and vision of the agency.
2. 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.

Navigation

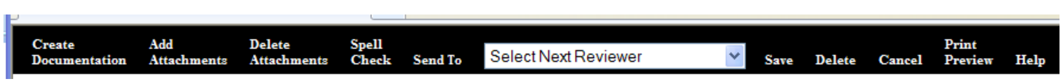
Sign on to the State Controller's Office Application Menu and choose the I-PERFORM Application.

The left frame functions as navigation between the areas of I-PERFORM. Depending on the individual's role this menu will have different options. An employee will have only "My evaluation" while the supervisor, who is also a reviewer will see "Performance Evaluations" and "Performance Review".

The navigation row at the top of the screen will remain static however the options may change from page to page.

From the main menu, access to other SCO applications is available by clicking on the *Applications Menu* button.

The *Help* button is available from any screen.

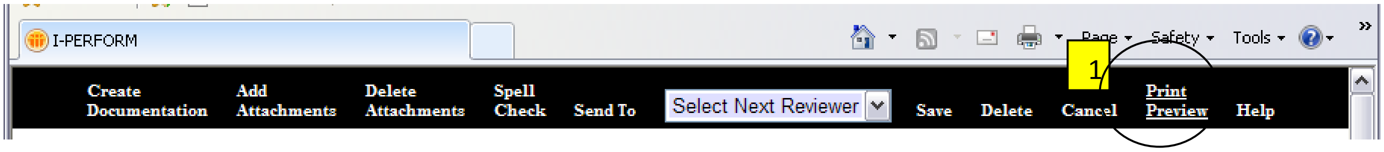


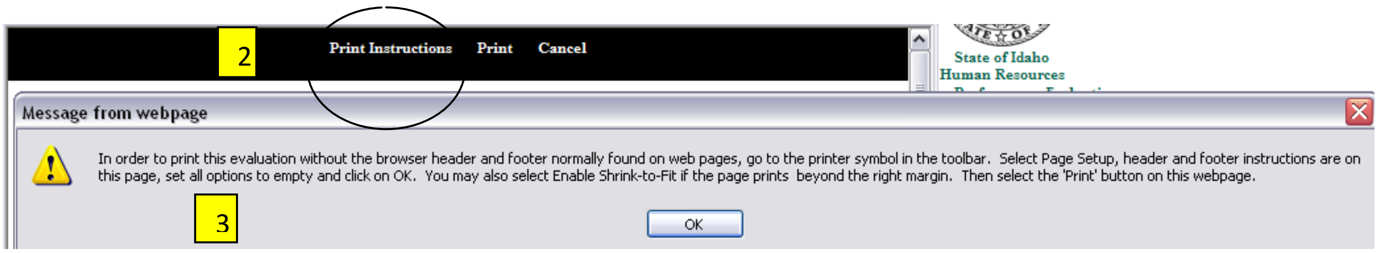
At any time while working in the evaluation document, *Cancel* in the top menu bar will take you to the previous page.

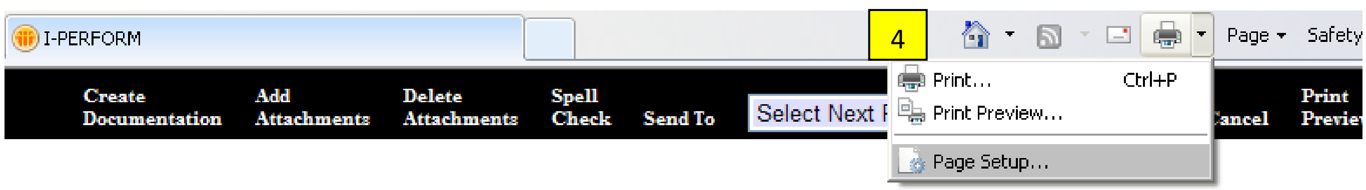
DO NOT USE THE BROWSER "BACK" BUTTON.

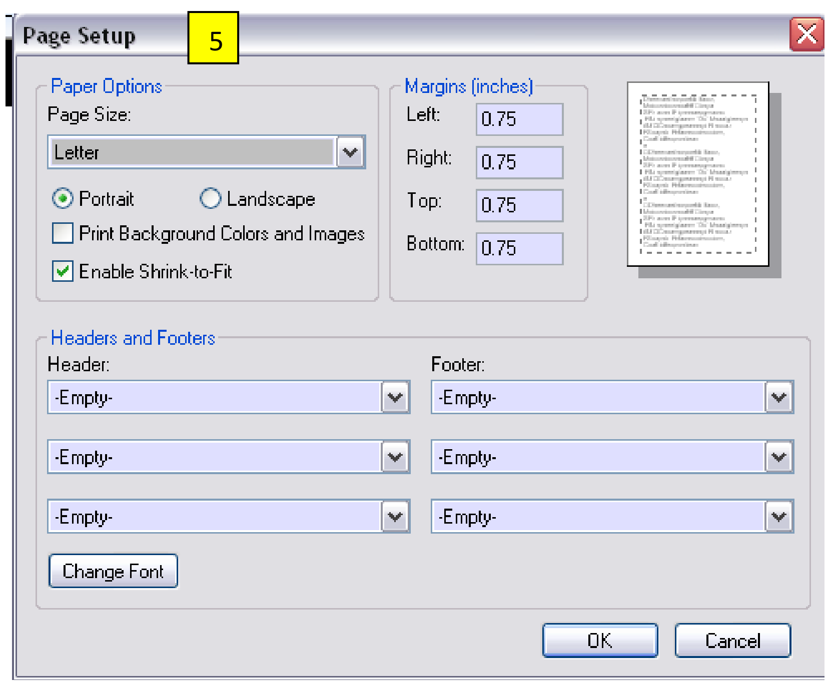
A *spell check* feature is available when typing in a document either by clicking the *spell check* button in the top navigation screen or by clicking on one of the red check marks ( ) displayed throughout the document.

The *print* feature in I-PERFORM requires specific printer settings due to the web based application. Follow instructions displayed when selecting *print preview*.









I-PERFORM User Roles

The user role selected in the I-PERFORM routing determines the functions and capabilities of each individual user.

Administrator – The system administrator is designated by the agency Director and is the person within an agency that is responsible for creating additional system administrators; creating and maintaining performance management routing; creating and maintaining agency evaluation standards; and creating agency appointees. The system administrator may be your employee that provides your internal HR functions or another highly trusted employee that provides operational support or both. A request form is available on the Division of Human Resources website *http://dhr.idaho.gov/iperform.html*.

Reviewer – This is typically the second level supervisor but can be anyone designated in the routing as needing to review the evaluation before the supervisor shares it with the employee. When the supervisor has completed the draft evaluation it is routed to the reviewer. The supervisor selects the reviewer from a drop down menu. The selected reviewer will receive an email notification that an evaluation is ready for their review. All reviewers in the routing group will be able to see evaluations pending. Reviewers can view the document and route it to another reviewer until the designated reviewer "completes the review". Reviewers will need to know internally who should "complete the review" as that reviewer's name will be printed on the evaluation as the reviewer. If a reviewer is unsure if they are designated to "complete the review, ultimately signing the evaluation, the audit/attachments tab will show the audit trail and who the evaluation was sent to for review/signature.

Supervisor – The immediate supervisor doing the evaluation will create and route a draft evaluation. After the evaluation is drafted, the supervisor routes it to the reviewer(s). After the review has been completed, the supervisor will need to route it to the employee.

Employee – The employee will receive an e-mail notification and will also be able to see if an evaluation is ready for their review and signature when they sign into I-PERFORM. The employee has the option of commenting on and signing, or refusing to sign, the evaluation. The evaluation is then automatically routed to the Agency Appointee if one is set up in the routing.

The employee can also view previously completed evaluations if the evaluation was completed using I-PERFORM.

Agency Appointee – This is the last person to sign off on the performance evaluation after it has been discussed with the employee; typically an agency director or division administrator as determined by the agency. Each agency can determine whether or not to have an Agency Appointee in the routing/signature process. If not appointee is set up in the routing, a signature line will not print on the evaluation.

Division of Human Resources (DHR) – Provides oversight and help desk and/or liaison with the SCO.

State Controller's Office (SCO) – Develop, maintain and provide systematic support.

For role specific help:

- If you are an agency administrator for I-PERFORM click here *(takes you to Administrative Functions Help).*
- If you are a supervisor click here *(takes you to Performance Evaluation Help).*
- If you are a reviewer click here *(takes you to Performance Review Help).*
- If you are an employee click here *(takes you to My Evaluation Help).*

Administrative Functions

Create New Performance Management Administrator: This function is designated by the Agency Director. DHR will set up your initial administrator upon request. An administrator setup form should be completed prior to administrators being set up. *Contact DHR for additional information for setting up an agency administrator.*
A current system administrator may create additional system administrators in the agency. This may be helpful for the initial set up of the routing groups if there are multiple routing groups to set up.

- The **Agency Administrator** drop down menu will show all employees in the agency. Select the employee to set up as an Administrator.
- Once a name is selected, go to the top of the screen and **Create new I-PERFORM Administrator.**
- Assigned administrators will be listed under **Current Agency Administrators.**

If the Agency is currently on ITIME, you can initially download current IPERFORM PELS (Performance Entry Locations) into I-PERFORM to populate routing groups for you agency. This will populate all your routing groups according to the TELS (Time Entry Locations) currently set up in ITIME so some modifications may be necessary.

- Click on the **Create PELs from ITime** from the top menu bar

Create/Maintain Performance Management Routing: This function allows the system administrator to verify and revise the routing groups and/or set up new groups.

If TELS were downloaded from ITIME into I-PERFORM, the system administrator will verify the employees, supervisor, and reviewer for the routing and approval process for employees' evaluations since the PELS will initially mirror the supervisory "set up" in I-TIME.

If the agency does not currently use ITIME, employees will have to be entered manually.

Each supervisor needs a separate Routing Group/Title.

Create Routing Groups/Titles:

- Type the **Title** of the new routing group.
  (The title should be descriptive enough to define the organizational group (may mirror the agency organizational chart), but generic enough that it does not have to be changed with every organizational change. Titles can be changed but it is advisable to limit changes to ensure documents developed in that group stay in that group.)
- Click on the drop down menu for each level of routing.
- Select the name of the individual assigned to that role (Reviewer, Supervisor, Employee). Select **Add**, then **Ok.**
- Once the routing group is set up, click **Save** from the top menu bar.
- Continue to set up each routing group in the agency.
- Click **Cancel** from the top menu bar to return to the previous menu.

<u>Edit/Change Routing Groups/Titles:</u>

- Select the title of the routing group needing modified. *(This will populate the levels with existing assignments.)*
- Click on the drop down menu for each level of routing.
- Select the name of the individual to be added or removed.
- Select **Add** or **Remove**, then **Ok.**
- Click **Save** from the top menu bar.
- Continue to modify each routing group needing updated in the agency.
- Click **Cancel** from the top menu bar to return to the Administrative Functions Menu.

<u>Create/Maintain Evaluation Expectations:</u> This function will allow the system administrator to add agency specific performance expectations in addition to the four state required performance expectations of Professionalism, Promoting Responsible Government, Customer Focus, and Leadership. The four (4), pre-set, statewide, performance expectations cannot be modified. Currently, agency specific performance expectations can only be created for use on an agency-wide basis.

To create an agency specific Performance Expectation:

Expectation Title – Provide a title for the specific Performance Expectation in the designated field. *If you have a current expectation pulled up, you will need to select "**New**" to create an additional expectation.*

- **Overall Description –** Provide a clear description of what is being evaluated.
- **Performance Description. –** Describe each level of performance.
- **Details -** Describe what the performance should look like listing various expected behaviors, competencies or tasks for each performance level.
- On the top Menu bar, select whether the expectation is to be applied to all employees <u>or</u> for a **supervisor only**.
- Click **Save**, if expectation is not final; Click **Save and Publish** when the expectation is ready for use.
- Click **Cancel** from the top menu bar to return to the Administrative Functions Menu.

Create/Verify Agency Appointee : This function allows the system administrator to identify the employee in the agency that has appointed authority as the final approver on an employee's evaluation. This is the last person to sign off on the performance evaluation after it has been discussed with the employee; typically an agency director or division administrator as determined by the agency. Each agency can determine whether or not to have an Agency Appointee in the routing/signature process. If no appointee is set up in the routing, a signature line will not print on the evaluation.

- **Current Signer** will show current agency appointee if one has been set up.
- **Select a new signer** from the drop down menu to modify or assign a new agency appointee.

Performance Evaluation

- **Select Personnel Management Location** (Routing Group) from the drop down Menu. This will bring up a list of employees in that Routing Group.
- **Select the employee**. The drop down menu will list all employees in the designated Routing Group. When an employee is selected, information on the status of the employee's evaluation will be displayed in the text box.
- If no evaluation is found, click **create evaluation** from the top menu bar. If an evaluation has already been started, click on the **employee name** to continue.

Cancel will return you to the home screen.
DO NOT USE THE BROWSER "BACK" BUTTON.

Performance Cover Sheet - this is the first page of the evaluation. This will be populated with the employee data. **The supervisor should verify that the data is accurate**.

- **Division/Unit:** This field is not auto-populated and will need to be filled in with the appropriate Division/Unit title or it can be left blank per agency discretion.
- **Dates:** The dates of the evaluation should cover the entire evaluation period. Please verify the dates with your agency HR contact.
- Select the type of review. If you are unsure of the type, contact your agency HR contact.

Note: The dates and type of review are required before the evaluation can be sent on.

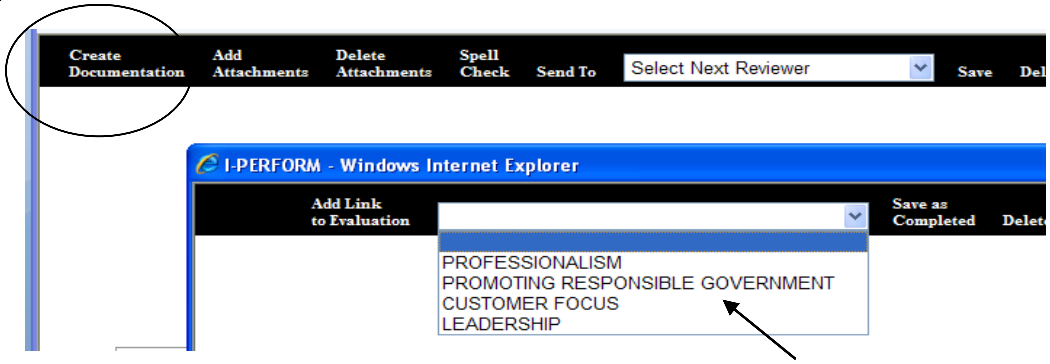
Performance Objectives – this page provides a brief description of the key responsibilities, in addition to the prior year objectives and developmental objectives.

- These can be copied and pasted from another document.

The red check mark (✓) is a spell checking feature.

Performance Expectations – this page outlines employee performance expectations and performance rating levels for each expectation. Assigning a rating to each performance expectation is optional but a comment on each is required. There are four pre-set, statewide performance expectations that all agencies must use: Customer Focus, Promoting Responsible Government, Professionalism and Leadership (if applicable). Agency specific expectations can be added by the agency administrator.

<u>Create Documentation:</u> I-PERFORM gives supervisors the option to track employee progress, accomplishments, discussions, etc. through the **Create Documentation** tab located in the top navigation bar.

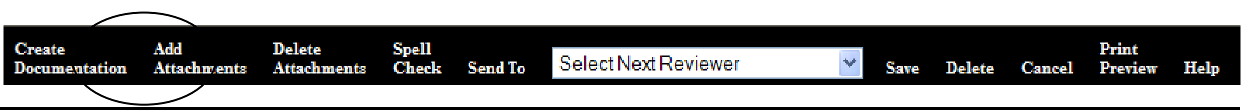


The documentation can then be linked to a specific performance expectation category.

- Select expectation category (e.g. Professionalism).
- Click **Add Link to Evaluation**.
- Complete the documentation form. The template will ask various questions to ensure thorough documentation.
- **Save as draft** if more is to be added later. **Save as Completed** if you are done with the document.

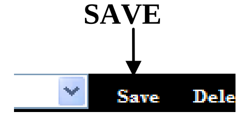
Note: When you select the expectation you want the documentation linked to, it will show that link in the expectation area of the performance evaluation.

<u>Add Attachment:</u> I-PERFORM gives supervisors the option to add an attachment from another program to the evaluation through the **Add Attachments** tab. The document can be nearly any type of document (e.g: Word, Excel, PowerPoint, etc.). Attached documents will need to be printed separately.



After the attachment has been added, it will show under the <u>Audit/Attachments tab</u>.

Frequently **SAVE**



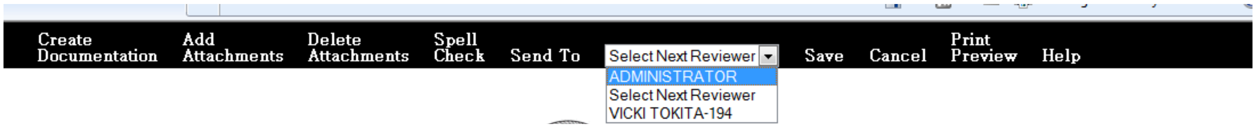
your document.

<u>Performance Summary</u> – this page summarizes the current year performance and sets performance and developmental objectives for the following year.

<u>Audit/Attachments</u> – The audit feature will create a *timestamp* each time the evaluation is saved, routed or signed. Reviewer comments will be documented here along with any other documentation or attachments that have been included.

<u>Routing the Evaluation</u> - When the supervisor has drafted the evaluation it can be routed to the reviewer. Each step of the routing process that requires action will generate an email notification to the appropriate person and will also show at the log-in screen.

- Select the appropriate reviewer from the drop down menu and click **Send to**.



Performance Review

Reviewer Signature: When the evaluation is routed to the reviewer an email is sent to the designated reviewer in the routing group. However, all reviewers in the routing group will be able to see the evaluation under the "Performance Review" tab. The Reviewer(s) can go into Performance Review and view the status and evaluations. The reviewer(s) has the option of:

- Send to the next reviewer – this will timestamp the evaluation but will not sign it.
- Comment and return to supervisor – this will document the comment and timestamp the review. The supervisor will then need to re-route the evaluation after any changes.
- Review Complete – This will **sign** the evaluation as Reviewer and send it back to the supervisor.

Note: It is important that only the Reviewer whose signature is required on the evaluation "complete the review".

Supervisor Signature: Once the review of the evaluation has been completed and the supervisor is ready to share it with them employee, the supervisor will select **Send to Employee.** This will apply the supervisor's signature and the date to the evaluation.

Employee Signature: The employee has the option to comment, sign and/or refuse to sign the evaluation. Once the employee makes their selection, the signature (or refusal to sign) will be applied to the evaluation along with the date and time stamp.

The evaluation is now complete and ready for the Agency Appointee signature. The evaluation will automatically route to the Agency Appointee.

Performance Data

The overall ratings of completed evaluations on file are stored and accessed through this feature. Only authorized individuals, typically agency Human Resources staff, have access to this feature.

My Evaluation

Employees can access any of their evaluations completed through I-PERFORM once the evaluation has gone through the complete process.