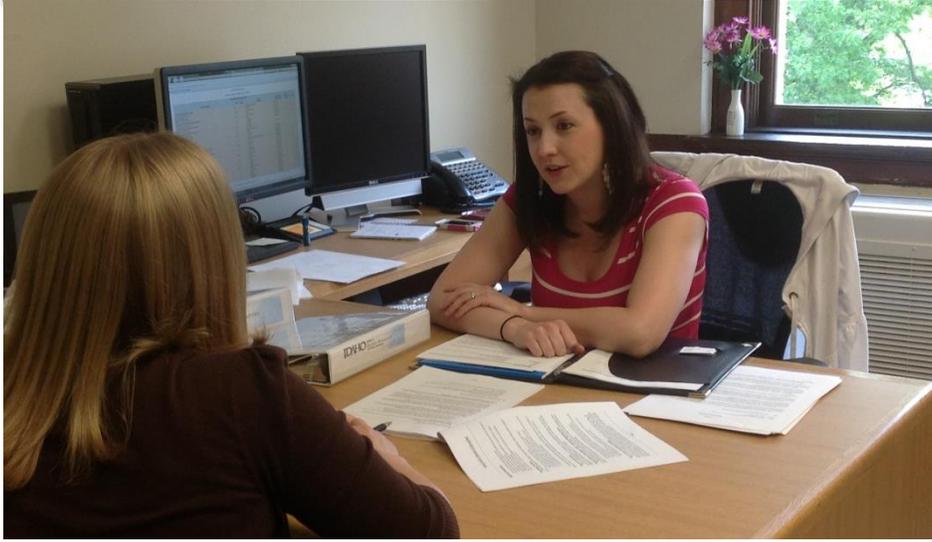


I-PERFORM
Performance Management System



Supervisor User Guide

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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 email the Division of Human Resources at 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) 334-2263
iperformhelp@dhr.idaho.gov

For Comprehensive Performance Management Training, visit www.dhr.idaho.gov and click on The Supervisor Academy program.



I-PERFORM Supervisor User Guide

EMPLOYEE PERFORMANCE EXPECTATIONS (STANDARDS) CROSSWALK

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 current performance expectations. Note: Standards from prior evaluation form will be duplicated within the revised performance expectations.

Current Performance <i>Expectations</i>:	Previous Performance <i>Standards</i>:
<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's 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:

- Providing consistent, effective, and timely feedback and coaching.
- Evaluating current skills, identifying missing skills, and creating a development plan to close existing skill gaps.
- Setting expectations and resetting them as they change.
- 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

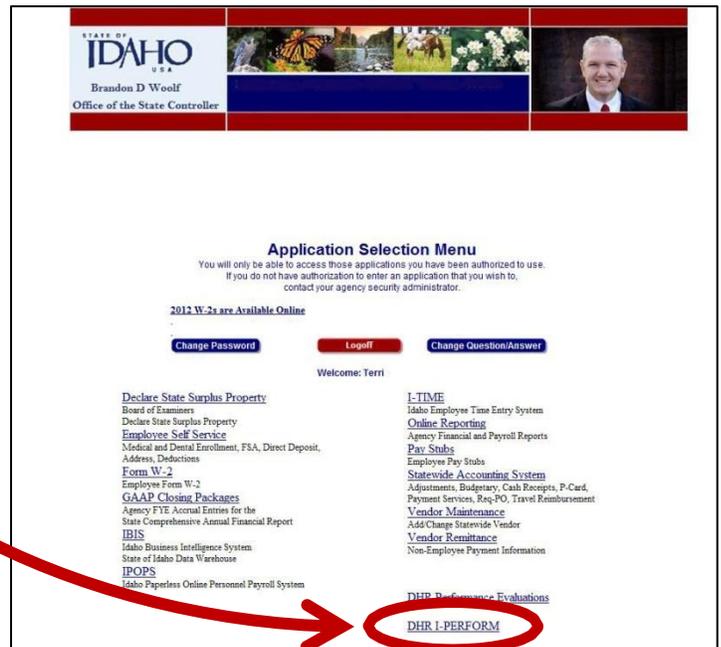
I-PERFORM Roles, Responsibilities, and Access

Role	Responsibility	Access
Employee	<ul style="list-style-type: none"> • Review both current and past performance evaluations for clarity of: <ul style="list-style-type: none"> ○ Expectations ○ Current and future goals and objectives ○ Agreed upon 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 • Sign or Refuse to sign the evaluation • View Final evaluation after evaluation is transmitted to the State Controller's Office
Supervisor	<ul style="list-style-type: none"> • Maintain documentation in the Supervisor's Employee Folder • 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 levels and apply them consistently and without bias 	<ul style="list-style-type: none"> • Access to Electronic Employee Folder • Create and delete "Draft" status evaluations • Auto populate goals , objectives, and developmental objectives • Review comments by reviewers and employees • Add and delete documentation and attachments as necessary • Print evaluation for employee • Final review and approval after employee comments and signs • Access to run reports for employees supervised
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"> • Review evaluations • Return to supervisor for edits and/ or Review complete, if no changes are needed
Administrator	<ul style="list-style-type: none"> • Create Administrators and assign access levels • Create/ Edit the agency-specific PEL routing structure within I-PERFORM • Create and maintain agency specific evaluation standards, if used • Input and maintain Agency Goals and Objectives • Create agency appointees, if used • View employee evaluations agency wide • Create/ Edit Job Templates • Run agency wide reports • Assist supervisors and employees with questions or issues related to I-PERFORM 	<ul style="list-style-type: none"> • Perform Agency Administrative Functions • Perform Agency HR Functions
Agency Appointee	<ul style="list-style-type: none"> • Agency Appointee is not required. Some Agency Directors prefer to review and sign off on all employees' evaluations. 	<ul style="list-style-type: none"> • View/review performance evaluations • Sign 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"> • Perform Statewide Administrative functions • Perform all Statewide HR Functions

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. **HR Functions** are for designated agency HR personnel. Allows viewing of agency evaluations and status.
5. Supervisors can capture notes during the review period by selecting **Supervisor Employee Folder**.
6. All employees can access their performance evaluation by clicking on **My Evaluation**.
7. 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*

Supervisor Employee Folder

The supervisor employee folder allows supervisors to keep documentation throughout the year specifically for each employee. In the form of documentation, general notes, and attachments.

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.

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

The note screen will allow you to select from three options: Attachment, Documentation or Notes.

- 1. Attachment:** Attach a document saved in your word files, including emails.
- 2. Documentation:** A template for more formal documentation and easily exported to the employee evaluation form.
- 3. Notes:** Information that you would like to retain as part of the electronic employee folder. The **Note** option has subcategories for **Feedback on Performance** or **Assignment Change**.

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...

I-PERFORM Supervisor User Guide

4. The example selected to the right is the **Note** category. If you select **Note**, you will add a **BRIEF Description** of the situation.

5. Select a **Note** category, as well as a subcategory: **Feedback on Performance** or **Assignment Change**. Then, write your **Notes**, following the guidelines discussed at the beginning of this document. Click **SAVE**. The window will close and you will be returned to the Main Screen.

State of Idaho
Senate
Employee Performance Supervisor Notes

Employee Name:	BART DAVIS	Job Title:	SENATORS
PCRN:	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.

6. The note will now display in the **Supervisor Employee Folder**, under the associated employee. Click the **date** to view the note.

Home Create Supervisor Notes Help Logoff

State of IDAHO I-PERFORM

Welcome: SEATTLE WASHINGTON-100

Select Personnel Management Location: ROUTING FOUR

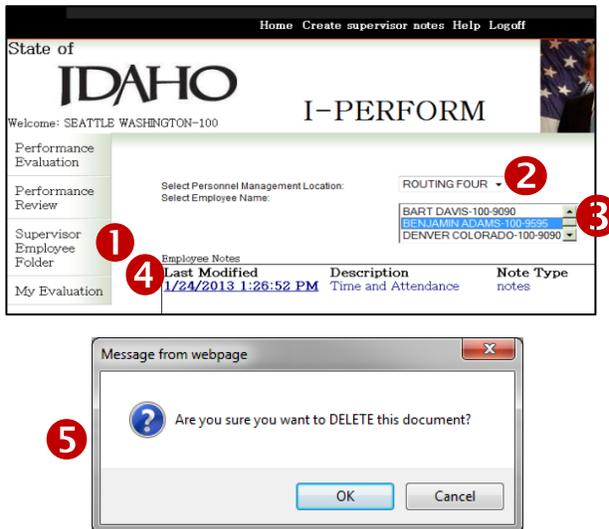
Select Employee Name:
BART DAVIS-100-9090
BENJAMIN ADAMS-100-9595
DENVER COLORADO-100-9090

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.

Delete/ Edit a Note

1. Click on **Supervisor Employee Folder**.
2. Select the appropriate **location**.
3. Select the **employee** for whom you would like to delete/ edit information.
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**. The window will close and you will be returned to the Main Screen.



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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 of the employee information will prefill; verify accuracy. This page is the **Performance Cover Sheet** Tab.
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. The dates must be formatted exactly as pictured.* You may 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.**



Move to the
Performance
Objectives Tab

Performance Objectives

1. In the Performance Objective page you will document the **Key Responsibilities** or the **Essential Functions** of the employee's job.
2. Enter the **Objectives** that were assigned during the last evaluation period, or if this is the first time using IPERFORM for this employee, enter or copy and paste the prior year objectives from the previous evaluation.
3. 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* for the upcoming year. Developmental Objectives should be designed to increase an employee's professional growth by increasing knowledge, skills, and/or abilities by training and educational opportunities.
5. Add comments regarding progress toward the objective goals. 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.



Move to the Performance Expectations Tab

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:

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

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

3 **Prior Year Objective #2:**
Due Date:
Objective Description:
Status Update (Date): Percentage Complete:
(Comment): ✓

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

5 **Prior Year Development Plan 1:**
Delete Objective #1
Due Date: ✓
Objective Description:
Objective:
Performance Measurement:
Status Update (Date): Percentage Complete:
(Comment): ✓

Prior Year Development Plan 2:
Due Date:
Objective Description:
Objective:
Performance Measurement:
Status Update (Date): Percentage Complete:
(Comment): ✓

Prior Year Development Plan 3:
Due Date:
Objective Description:
Objective:
Performance Measurement:
Status Update (Date): Percentage Complete:
(Comment): ✓

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.

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. Assign a rating for each category. If the rating option is not available, this means your agency only uses the overall rating on the Performance Cover Sheet.
5. **Add Comments** for each expectation that support each rating or the overall rating. **Comments on each expectation are required in I-PERFORM.**
6. If there is any documentation that you have assigned to this performance expectation from the Supervisor Employee Folder, it will show in the *Documentation field*. See next page to create/handle documentation. 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.

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

4 **Show expectation**

3 **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

5 COMMENTS

6 DOCUMENTATION

Date Comments



Move to the
Create
Documentation Tab

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. 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.*
5. Click **Save as Draft** if you wish to continue working on the comments, OR
6. **Save as Completed** if you are done with the comments.
7. You can view, review, or edit the documentation from the *Audit/Attachments* tab.
8. 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 periodically capturing notes in the Supervisor Employee Folder.

1. Create Documentation

2. Add Link to Evaluation

3. Save as Draft

4. Add Link to Evaluation

5. Save as Completed

6. Audit/Attachments

7. Audit/Attachments

8. Documentation

2. What was the event?

3. When did it occur?

4. Add Link to Evaluation

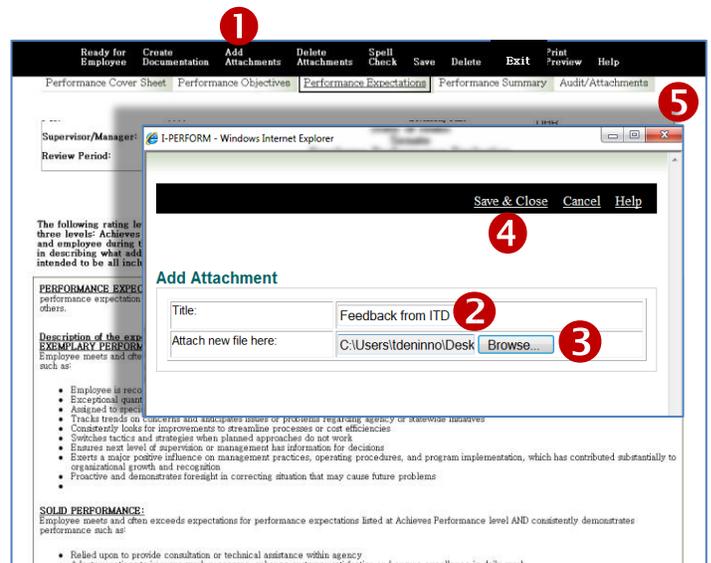
4. Add Link to Evaluation

I-PERFORM Supervisor User Guide

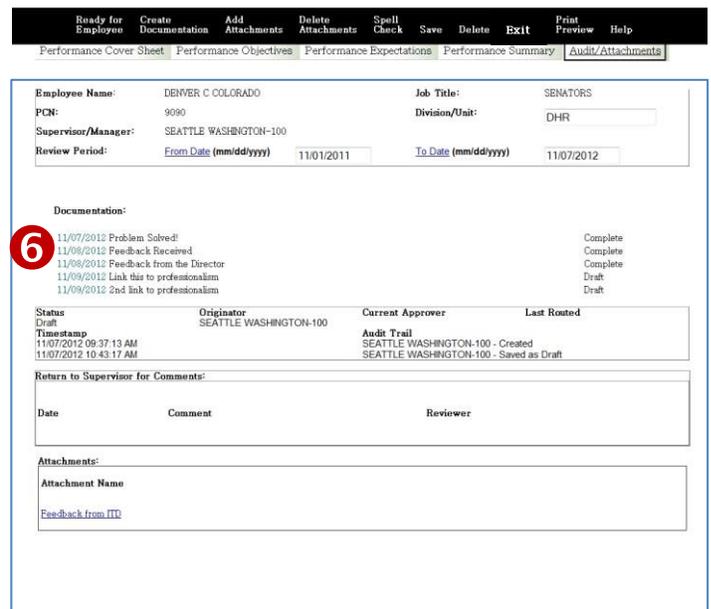
Add Attachments

In addition to creating documentation to the evaluation, supervisors can also add attachments in the evaluation, i.e. pertinent emails or letters related to the employee's performance.

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**.



Attachments within the evaluation will be viewable by the employee once the evaluation is complete.



Move to the
Performance
Summary
Tab

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. This helps employees understand how they help make the organization successful.
4. **Select the agency goal** you would like to set as an expectation from the drop-down list. If your agency does not use agency goals, you may create a **blank agency goal**. 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. 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 plan should be based on training objectives supporting the employee's success within the organization.

The screenshot shows the 'Performance Summary' tab in 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 the 'PERFORMANCE SUMMARY' section. It includes a text area for a summary, with a red circle '2' pointing to it. Below that is the 'AGENCY GOALS AND PERFORMANCE OBJECTIVES FOR NEXT REVIEW PERIOD' section. It has a red circle '3' pointing to the introductory text and a red circle '4' pointing to a dropdown menu for selecting goals. Below the dropdown is the 'Employee Development Plan' section, with a red circle '5' pointing to its introductory text. At the bottom of the form, there are fields for 'Development Objective #1', 'Due Date', and 'Objective Description', with a red circle '5' pointing to the 'Objective Description' field. At the very bottom, there are fields for 'Status Update:(Date)' and 'Percentage Complete:'.



When you update the progress of performance objectives and developmental objectives, you will need to create a new evaluation for the next review period. The performance objectives and developmental objectives will auto populate. This will allow you to track and enter a status update.

I-PERFORM Supervisor User Guide

Route the Draft Performance Evaluation for Review

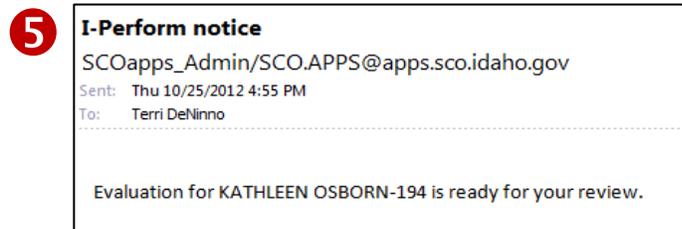
Routing the electronic evaluation is basic in its concept. The supervisor will route the evaluation to a designated reviewer(s). The reviewer will complete the review and route back to the supervisor. The supervisor will print a copy of the evaluation for discussion with the employee. The supervisor will route the electronic copy to the employee and the employee may add comments and sign the evaluation. The evaluation is sent back to the supervisor for final approval.



There can be a few variations to the process which are described below.

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 name of the person that is the reviewer. Typically, this is your supervisor. Click on **Send To**, then select **Reviewer Name**.
4. A system-generated email will be generated to the reviewer to start their review of the performance evaluation. The Reviewer may select **Review Complete** or **Return to Supervisor**. If **Review Complete** is selected, the review is approving the evaluation as written. If the reviewer selects **Return to Supervisor**, the reviewer may make comments or suggested edits for the supervisor's consideration.
5. If changes are made, the supervisor would re-route the evaluation back to the reviewer for **Review Complete**. The supervisor will receive a system generated email.

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		



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

Review of the Draft Evaluation

1. When all reviews are done and the evaluation draft is ready, print the evaluation for use during your face-to-face meeting with the employee. 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.

Discussing the evaluation with the employee and your manager will allow the best opportunity to make the evaluation meaningful for all involved.

3. Click **Cancel** after printing to close the box. After meeting with your employee, make any agreed-upon changes. If changes are made to the evaluation, you will need to re-route to your reviewer again for approval.
4. Send to employee for their final comments and signature by clicking on **Ready for Employee**. At this point you still can return it to draft status. The status will now show as *Employee Review* on the home screen.
5. The employee will receive an email notification and may add their comments and add electronically sign the evaluation. The employee cannot make any changes to the evaluation text. When the employee has either signed or refused to sign, the evaluation will be automatically forwarded for final approval.
6. If an **Appointing Authority** is used, it is routed to the designee. If an **Appointing Authority** is NOT used, the evaluation is sent back to the Supervisor for Final Approval. When the supervisor selects Final Approval, the evaluation status will reflect Complete. The evaluation data will be transmitted to the Controller's office.

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.				

4

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. If you need space for your comments, please contact your supervisor.				
SIGNATURE SECTION:				
DENVER COLORADO-100		6		
Employee Signature	(Signature acknowledges discussion of evaluation, but does not necessarily imply agreement)	11/16/2012 1:41:22 PM	Date	
SEATTLE WASHINGTON-100		11/16/2012 11:12:26 PM		
Supervisor Signature	(Signature acknowledges that this evaluation and key responsibilities have been discussed with the employee.)	Date		
ADA COUNTY-100		11/16/2012 9:53:1 AM		
Reviewer Signature		Date		

I-PERFORM Supervisor User Guide

Retrieving Evaluations

After logging into I-PERFORM :

1. Click on **Performance Evaluation**.
2. Select your **Location** from the list box by clicking on the arrow.
3. Click on the **Employee Name** you need the evaluation.
4. To open an evaluation, click on the **name** associated with the specific evaluation you want to view. You may edit an evaluation in draft status at any time. If the evaluation has been transmitted, it is considered final.

State of IDAHO I-PERFORM

Welcome: SEATTLE WASHINGTON-100

Performance Evaluation

Select Personnel Management Location: [Dropdown]

Select Employee Name: [Text Field]

Routing Four

Select Employee Name: [Dropdown]

Employee Name	PCN	Evaluation Type	Review Period	Status
BART DAVIS	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 your Agency HR Representative.

I-PERFORM Supervisor User Guide

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.
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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.
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Return to Supervisor	Return to Supervisor indicates that the final reviewer in the agency's process has reviewed and would like revisions to the evaluation. The Reviewer may provide comments in the comment field or just request to meet and discuss the employee evaluation. The supervisor would then make the edits , then re-route the evaluation to the Reviewer.
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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 evaluation is now ready to be shared with the employee. The supervisor would then select the Ready for Employee option.
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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. If an Appointing Authority is not used, then the employee supervisor will have the Final Approval action.
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Complete	Complete Status indicates that the all signatures have been added and the evaluation is final and ready to transmit the evaluation data to the Controller's Office. To make changes on the evaluation contact your agency HR Representative.
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Transmitted	Transmitted Status indicates that the evaluation has been uploaded to the State Controller's Office and evaluation data is now in the DHR/ Agency Performance Evaluation History.
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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.

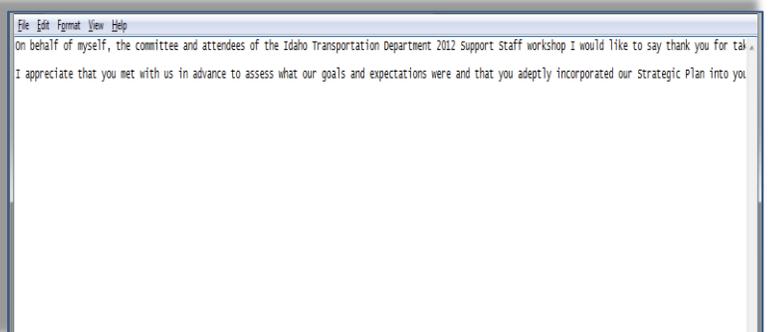
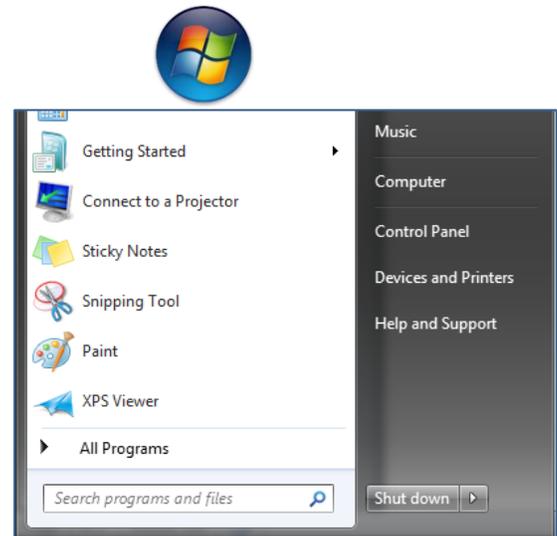
KEY RESPONSIBILITIES:

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.

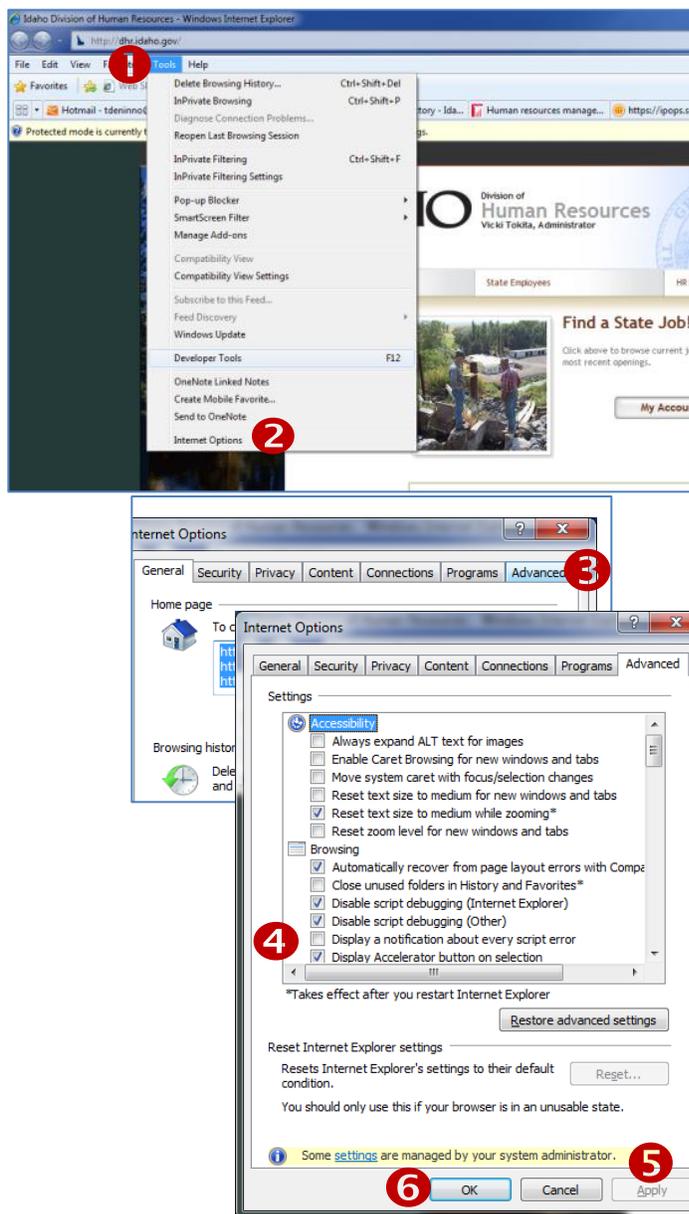


Help: Allowing/Showing Error Pop-Ups

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.