

### **Employee Guide**



208.334.2263 http://dhr.idaho.gov/

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

### **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- <u>iperformhelp@dhr.idaho.gov</u>. If you have any suggestions for this help manual please contact the Division of Human Resources.



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

#### **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 Roles

Role	Responsibility	Access Rights
Employee	<ul> <li>Review both current and past performance evaluations for clarity of:         <ul> <li>Expectations</li> <li>Developmental opportunities</li> <li>Agreed on actions to be taken for development</li> <li>Documentation of performance</li> </ul> </li> </ul>	<ul> <li>View draft evaluation once forwarded by supervisor</li> <li>Add comments to the evaluation on the cover sheet</li> <li>View documentation and attachments once the evaluation is marked complete by the supervisor</li> </ul>
Supervisor	<ul> <li>Create and maintain performance evaluations for staff</li> <li>Follow routing and approval processes of the agency</li> <li>Utilize the four Performance Expectations as set forth by the Office of the Governor</li> <li>Obtain a clear understanding of the individual rating distinctions, and apply them consistently and without bias</li> </ul>	<ul> <li>Create and delete "Draft" status evaluations</li> <li>Review comments by reviewers and employees</li> <li>Add and delete documentation and attachments before the evaluation is transmitted to SCO</li> <li>Return an evaluation to "Draft" Status (if the evaluation has not yet been signed by the employee.)</li> </ul>
Reviewer	<ul> <li>Assist the supervisor in creating a clear, concise, specific, informative, and legally-defensible performance evaluation</li> <li>Check for common errors</li> </ul>	<ul> <li>View evaluations sent by supervisor</li> <li>Enter comments into the review window, which are submitted back to the supervisor</li> </ul>
Administrator	<ul> <li>Create the agency-specific routing structure within I-PERFORM</li> <li>Create additional administrators for the agency*</li> <li>Create and maintain agency evaluation standards</li> <li>Create agency appointees, if used</li> <li>Assist supervisors and employees with questions or issues related to I-PERFORM</li> </ul>	<ul> <li>View/edit routing structure based on agency structures</li> <li>Add agency-wide performance expectations</li> <li>Add agency goals</li> </ul>
Agency Appointee	<ul> <li>Act as the last sign off on the performance evaluation after it has been discussed with the employee</li> </ul>	View/review performance     evaluations
DHR	<ul> <li>Provide oversight on the I-PERFORM system</li> <li>Provide training and support to agencies</li> <li>Relay programming issues to SCO</li> </ul>	<ul> <li>View all performance evaluations</li> <li>Return performance evaluations to draft status</li> </ul>

#### **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.
- 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**.
- 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.



Application Selection Menu be able to access those applications you have been authorized do not have authorization to enter an application that you wish to contact your agency security administrator.

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2012 W-2s are Available Onlin

#### **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: <u>SCOapps\_Admin/SCO.APPS@apps.sco.idaho.gov.</u>
- 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.



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: Employees

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

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

🖏 Ignore 🍇 Junk 🔹	X Delete	Reply Reply All	Forward 🖏 Meeting	음 Performance ஹ Team E-mail ಂ, Reply & Delete	<ul> <li>➡ To Manager</li> <li>✓ Done</li> <li>➡ Create New</li> </ul>	4 · · ·	Move	
Delete Respond		Qui	ick Steps	5		Mov		
From: To: Cc:		ops_Admin/SCO.A DeNinno	APPS@apps.sco.idaho.go	10				
	I-Dorf	orm notice						

State of	I-PERFORM
1 2 1	Employee Name PCN Evaluation Review Period Statua DENVER C 9090 Annual Review 11/01/2011- Employee 11/07/2012 Review Documentation Problem Solve of Documentation Feedback Roceired Documentation Feedback from the Directo
State of IDAH Welcome: TERN DENRAD-15	Accessibility Privacy & Security Copyright © 2009 State of Idaho, All rights reserved.
My Evaluation	Message we were the second of
B	Employee Name PCN Evaluation Type Review Period Status No current evaluations found.
	Accessibility Privacy & Security Copyright © 2009 State of Idaho, All rights reserved.

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

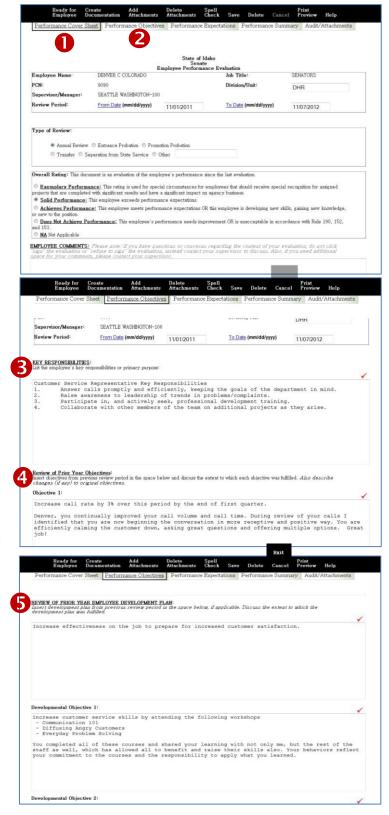
- 3. The bottom of the screen indicates **No Current Evaluation Found**, and/or
- **4.** You clicked on My Evaluation and see the message "No Current Evaluation Found".

#### **Review your evaluation:**

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

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

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

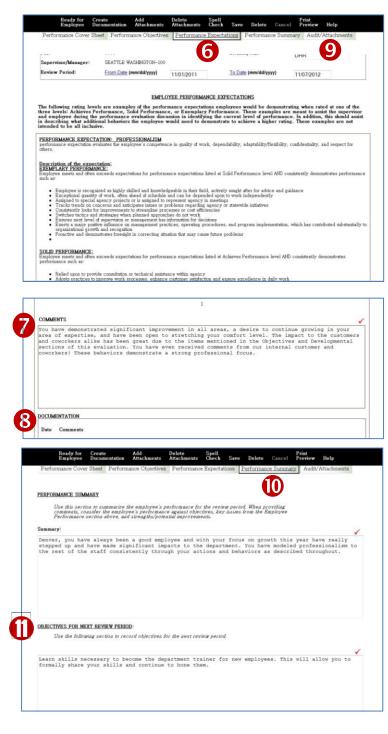


#### Review the Evaluation, Continued:

- 6. Click on **Performance Expectations**. This page describes the expectations in each of the State's four defined categories of *Professionalism*, *Promoting Responsible Government, Customer Focus*, and for managers and supervisors, *Leadership*. Each section includes descriptions for each of the ratings and examples of observable performance standards. Read through each, noting any comments you would like to discuss with your supervisor.
- 7. Review *Comments* for each performance expectation area.
- 8. As you read, you may see notes under the fields titled *Documentation*. These could be any type of documentation related to your performance throughout the review period.
- 9. If there is other documentation attached you will be able to read the detail by clicking on the *Audit/Attachments* tab.
- 10. Click on the **Performance Summary** tab. Read what your supervisor has written, which should summarize the witnessed performance during the review period.
- 11. Review comments listed in the Objectives for Next Review Period section. Once you and your supervisor have completed the evaluation discussion, you should work collaboratively to determine the steps you will take to address each performance objective for next year. Your supervisor may have already placed some comments in this field to use for discussion. When finalized, this plan should follow SMART criteria as described below.

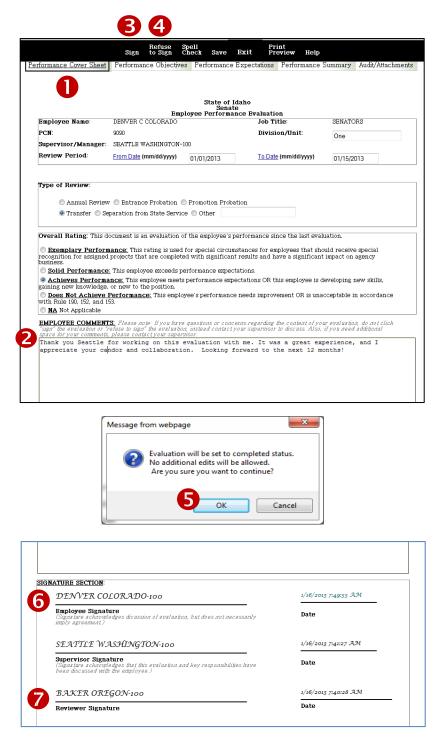
The Performance Review Process should be a collaborative effort. That means you have a responsibility in the process as well.

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



#### **Finish the Evaluation**

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



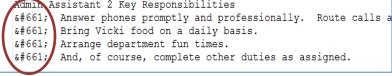
## **Tips: Copy and Paste into I-PERFORM**

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:**

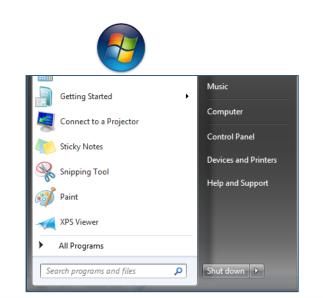
When copying and pasting directly into I-PERFORM you may see interesting characters where you did not see them before.

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:



#### How To:

- 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.**
- 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.
- Now that the formatting is erased, you can again copy and paste it into I-PERFORM without carrying "junk" with it.



#### <u>File Edit Format View Help</u>

On behalf of myself, the committee and attendees of the Idaho Transportation Department 2012 Support Staff workshop I would like to say thank you for tai I appreciate that you met with us in advance to assess what our goals and expectations were and that you adeptly incorporated our Strategic Plan into you

## Help: Allowing/Showing Error Pop-Ups

Edit

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'.

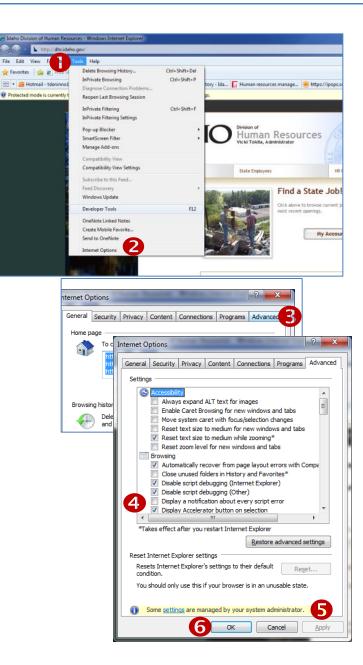
5. Click 'Apply'.

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.	