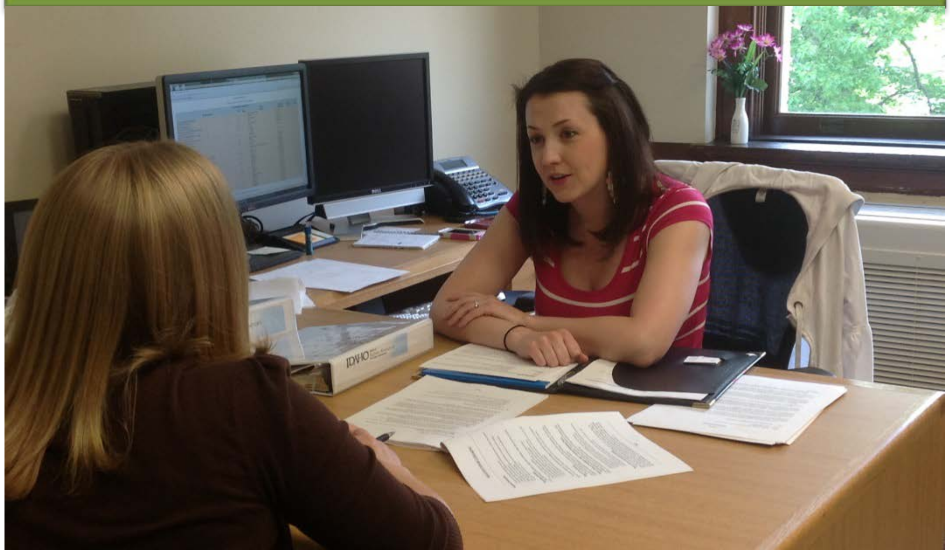
**I-PERFORM**
**Performance Management System**



# *Supervisor User Guide*

Idaho Division of
Human Resources
*Executive Office of the Governor*

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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.

# 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 *Expectations*: | Previous Performance *Standards*: |
|---|---|
| **PROFESSIONALISM**<br>This performance expectation evaluates the employee's competence in quality of work, dependability, adaptability/flexibility, and respect for others. | **Adaptability/Flexibility:** This describes how well the employee adapts to change and is open to different and new ways of doing things.<br>**Dependability:** This describes how well the employee completes assigned work in a timely manner. The employee meets attendance requirements.<br>**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.<br>**Quality:** This describes the employee' work in terms of consistency, thoroughness, and accuracy.<br>**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**<br>This performance expectation evaluates the employee's competence in adaptability, dependability, productivity, efficiency, work environment and safety. | **Adaptability/Flexibility:** This describes how well the employee adapts to change and is open to different and new ways of doing things.<br>**Dependability:** This describes how well the employee completes assigned work in a timely manner. The employee meets attendance requirements.<br>**Productivity:** This describes how the employee manages and completes workload expectations and demonstrates the knowledge and skills needed to do the job. |
| **CUSTOMER FOCUS:**<br>This performance expectation evaluates the employee's competence in customer service, conflict resolution, interpersonal skills, and communication. | **Adaptability/Flexibility:** This describes how well the employee adapts to change and is open to different and new ways of doing things.<br>**Customer Service:** This describes how well the employee works with internal and external customers to achieve desired results and maintain positive relationships.<br>**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.<br>**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**<br>This performance expectation evaluates the employee's competence to motivate people and efficiently manage resources in achieving the agency's mission. | Encompasses all facets of previous standards from supervisor/manager level. |

## 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 Roles, Responsibilities, and Access

| Role | Responsibility | Access |
|---|---|---|
| **Employee** | • Review both current and past performance evaluations for clarity of:<br>o Expectations<br>o Current and future goals and objectives<br>o Agreed upon actions to be taken for development<br>o Documentation of performance | • View draft evaluation once forwarded by supervisor<br>• Add comments to the evaluation on the cover sheet<br>• Sign or Refuse to sign the evaluation<br>• View Final evaluation after evaluation is transmitted to the State Controller's Office |
| **Supervisor** | • Maintain documentation in the Supervisor's Employee Folder<br>• Create and maintain performance evaluations for staff<br>• Follow routing and approval processes of the agency<br>• Utilize the four Performance Expectations as set forth by the Office of the Governor<br>• Obtain a clear understanding of the individual rating levels and apply them consistently and without bias | • Access to Electronic Employee Folder<br>• Create and delete "Draft" status evaluations<br>• Auto populate goals , objectives, and developmental objectives<br>• Review comments by reviewers and employees<br>• Add and delete documentation and attachments as necessary<br>• Print evaluation for employee<br>• Final review and approval after employee comments and signs<br>• Access to run reports for employees supervised |
| **Reviewer** | • Assist the supervisor in creating a clear, concise, specific, informative, and legally-defensible performance evaluation<br>• Check for common errors | • Review evaluations<br>• Return to supervisor for edits and/ or Review complete, if no changes are needed |
| **Administrator** | • Create Administrators and assign access levels<br>• Create/ Edit the agency-specific PEL routing structure within I-PERFORM<br>• Create and maintain agency specific evaluation standards, if used<br>• Input and maintain Agency Goals and Objectives<br>• Create agency appointees, if used<br>• View employee evaluations agency wide<br>• Create/ Edit Job Templates<br>• Run agency wide reports<br>• Assist supervisors and employees with questions or issues related to I-PERFORM | • Perform Agency Administrative Functions<br>• Perform Agency HR Functions |
| **Agency Appointee** | • Agency Appointee is not required. Some Agency Directors prefer to review and sign off on all employees' evaluations. | • View/review performance evaluations<br>• Sign performance evaluations |
| **DHR** | • Provide oversight on the I-PERFORM system<br>• Provide training and support to agencies | • Perform Statewide Administrative functions<br>• Perform all Statewide HR Functions |

## 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.

**Windows Internet Explorer 8**
Your version of Internet Explorer (IE) is important to the complete functionality of I-PERFORM. If your agency has moved to IE9 you will experience errors related to incompatibility. IE8 provides optimal performance.

When **copy and paste** is needed from one document into I-PERFORM, remove the formatting by pasting into the Notepad program first, then copy and paste again into I-PERFORM. This will remove all unwanted characters that are not always visible.

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.

Agency **security changes** typically will take 20-30 minutes to update after being made. Examples of changes:

- Updating PELs
- Access Levels
- Changing/Adding Administrators
- Routing Structures
- Job Templates
- Agency Goals and Objectives

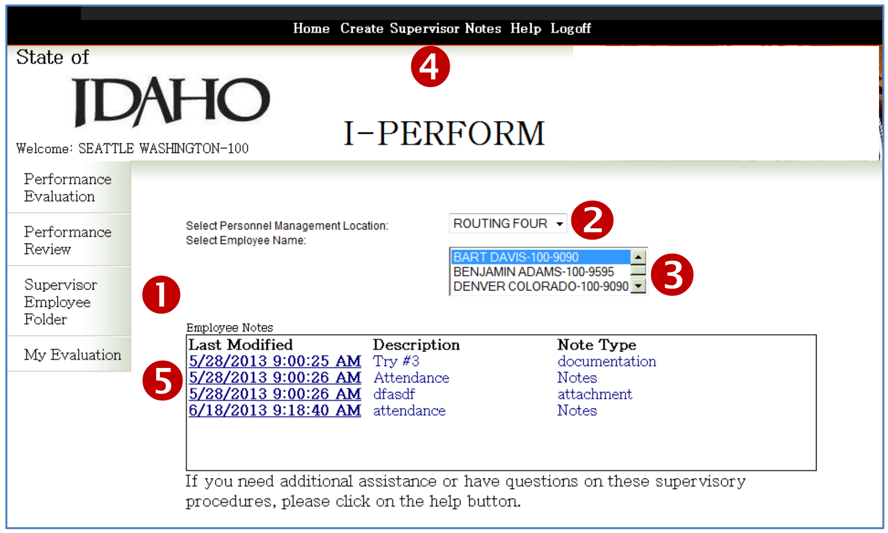
# Using I-PERFORM: *Supervisors*

## Supervisor Employee Folder

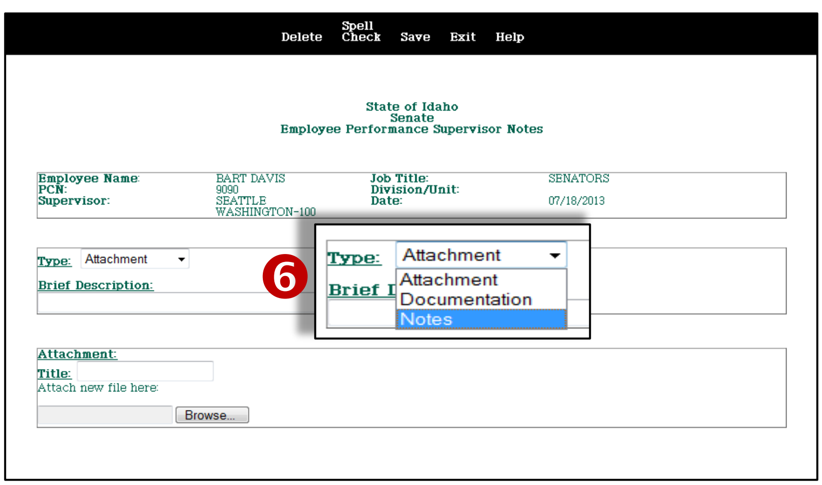
The supervisor employee folder allows supervisors to keep documentation throughout the year specifically for each employee. In the form of documentation, general notes, and attachments.

## Create Supervisor Employee Notes

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

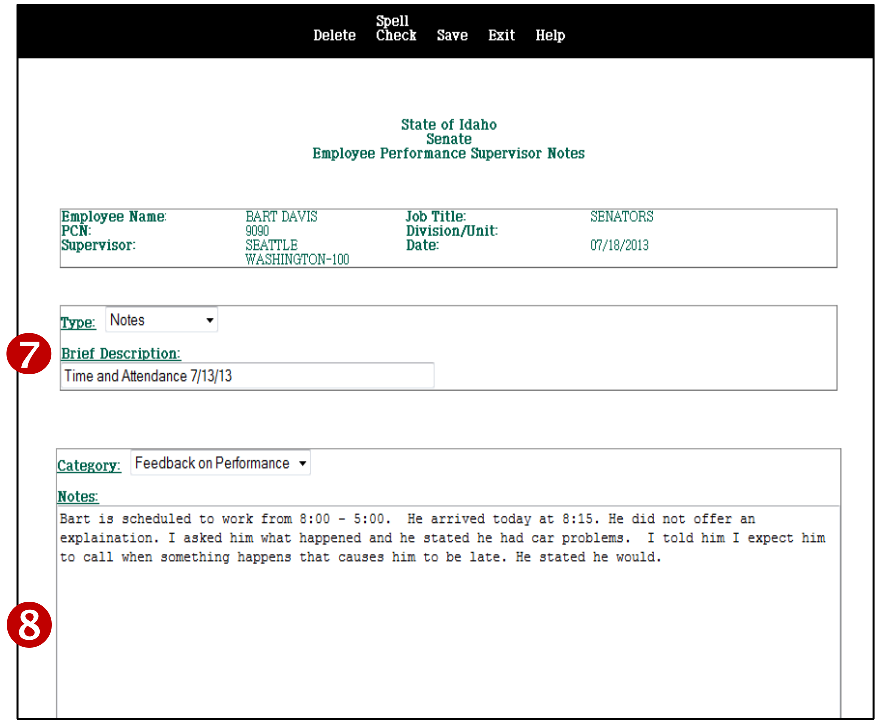



1. Click on **Supervisor Employee Folder** from the home screen.
2. Select the appropriate **location**.
3. Select the **employee** for whom you would like to document performance.
4. You can view any created notes or documentation by clicking on the appropriate item from the list.
5. Click on **Create Supervisor Notes** at the top of the screen in the menu bar.
6. The note screen will allow you to select from three options: Attachment, Documentation or Notes.
   a. **Attachment**: Attach a document saved in your word files, including emails.
   b. **Documentation**: A template for more formal documentation and easily exported to the employee evaluation form.
   c. **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**.

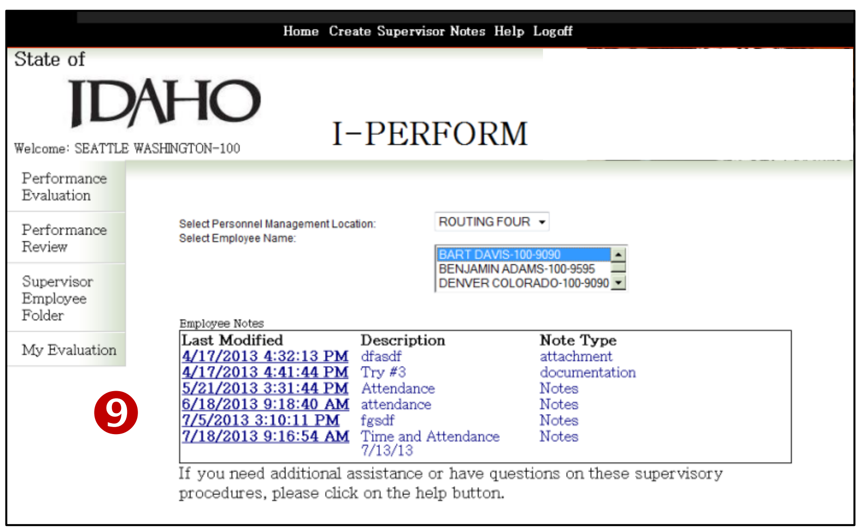


7. The example selected to the right is the **Note** category. If you select **Note**, you will add a **BRIEF Description** of the situation.

8. 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.

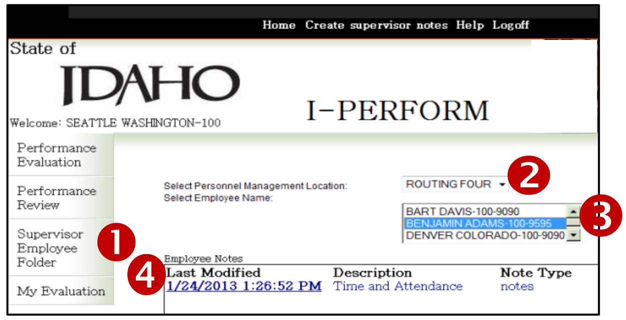


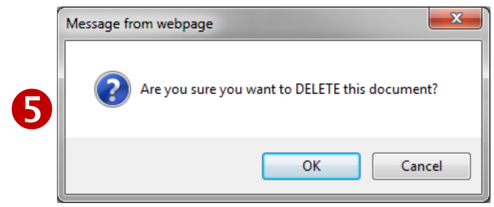

9. The note will now display in the **Supervisor Employee Folder**, under the associated employee. Click the **date** to view the note.



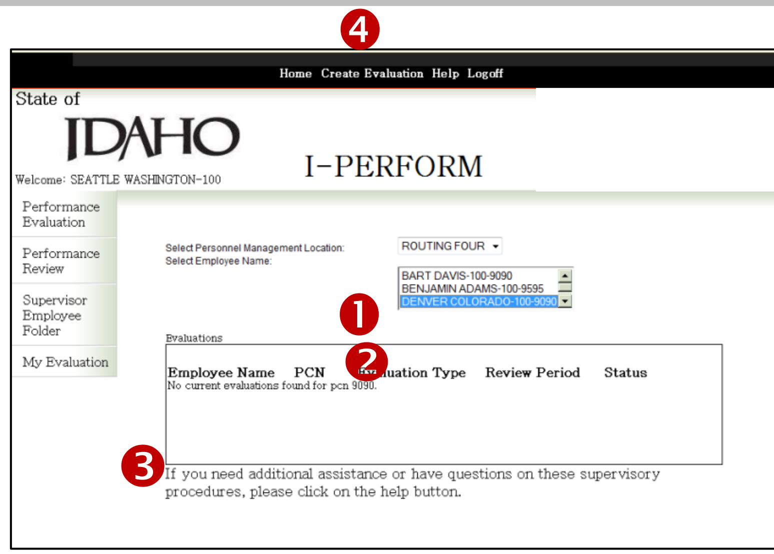
## Delete/ Edit a Note

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 contine, click **OK.** The window will close and you will be returned to the Main Screen.



## Create a New Evaluation



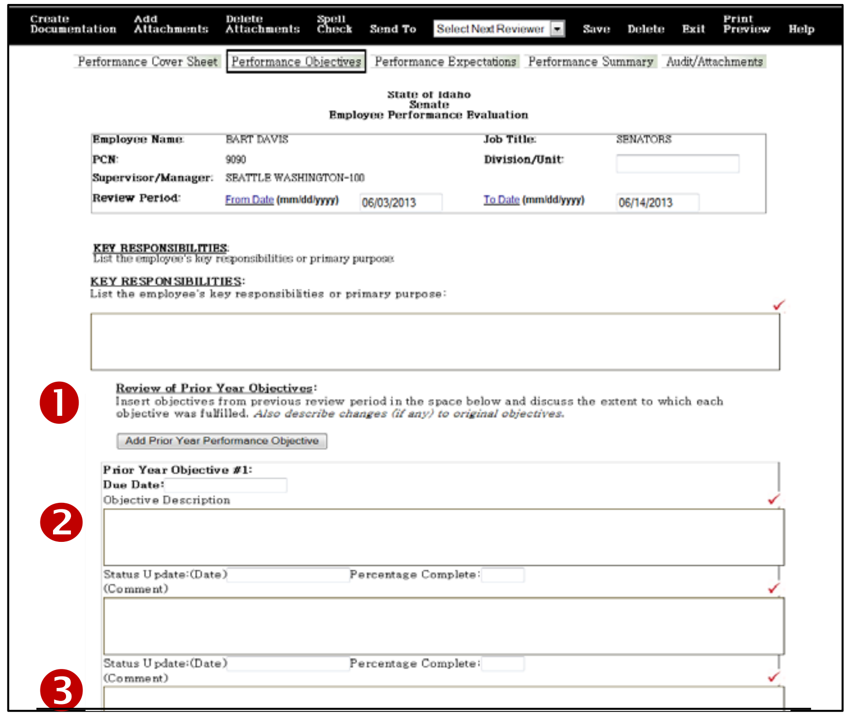

1. After logging into I-PERFORM and choosing **Performance Evaluation** from the main menu, select the correct **Management Location** from the list.
2. Select the **Name of the Employee** for whom you wish to create the evaluation.
3. The box below the employee name will auto populate with their I-PERFORM 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.

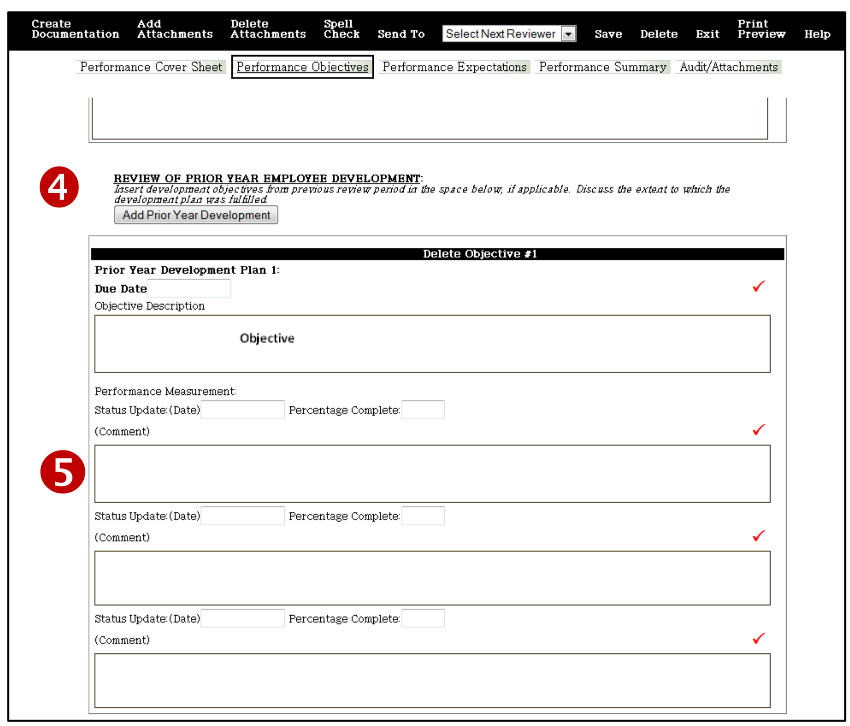

5. Most of the employee information will prefill; verify accuracy. This page is the **Performance Cover Sheet** Tab.
6. Complete the field for **Division/Unit**.
7. Enter the **From** and **To Dates** for this evaluation period. *Note: The dates and type of review are required before the evaluation can 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. **<u>After completing the evaluation</u>** 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. **<u>SAVE before moving to the next tab.</u>**

**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.

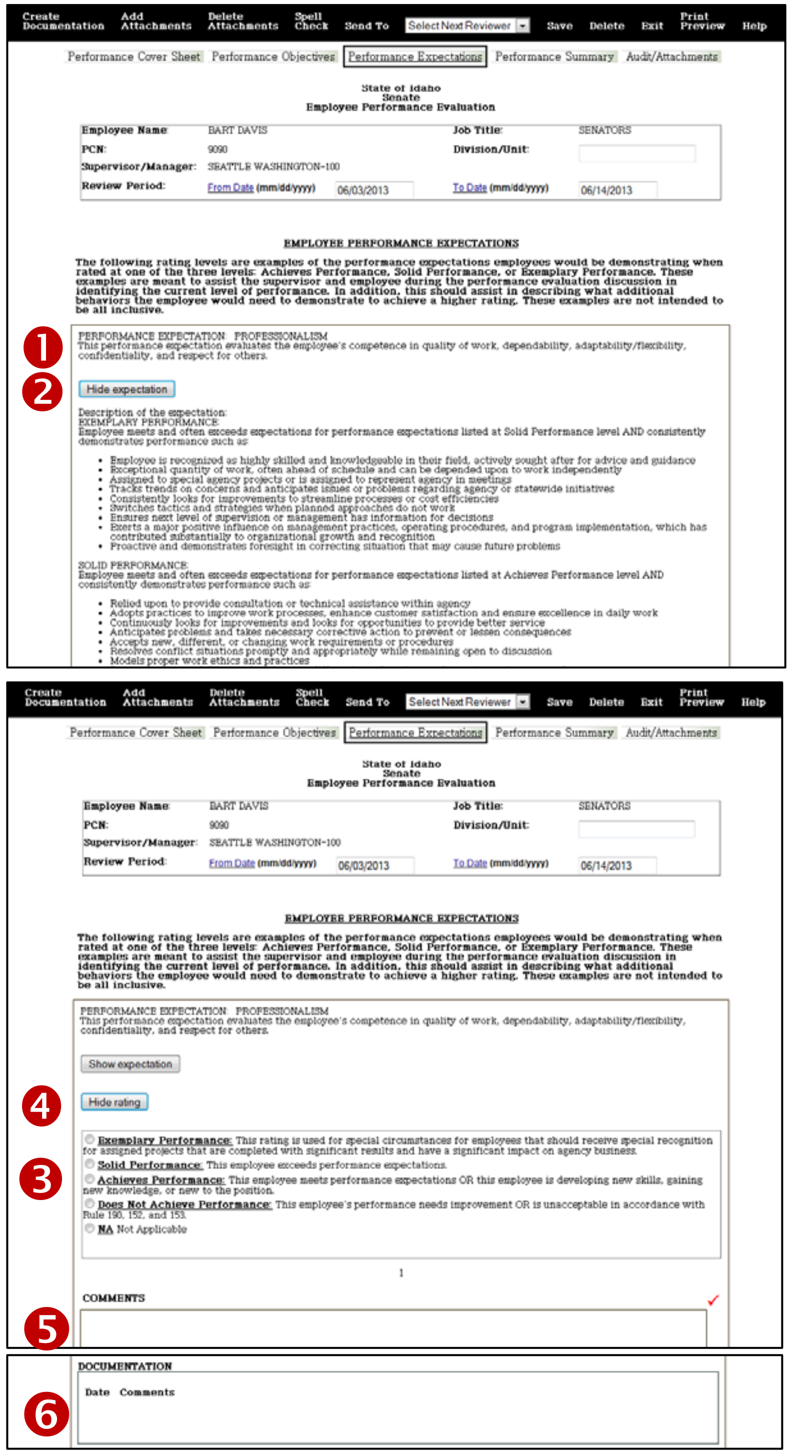
**Move to the Performance Expectations Tab**

## Performance 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.

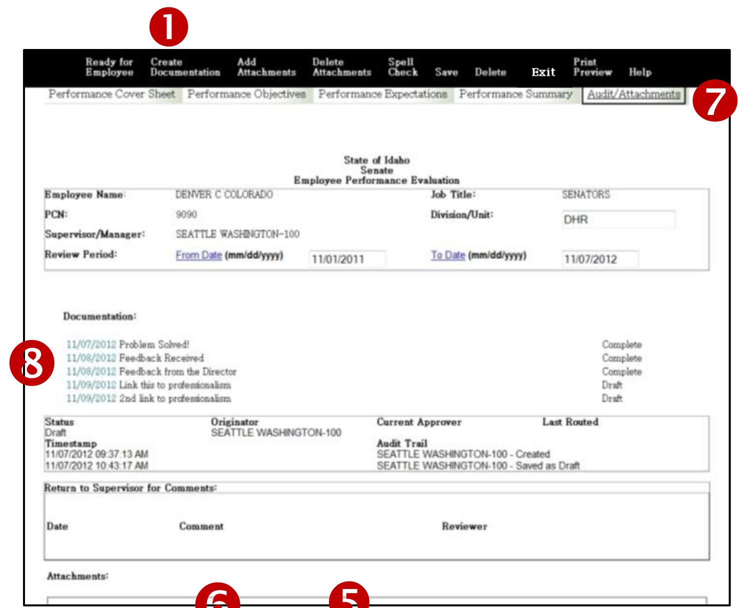


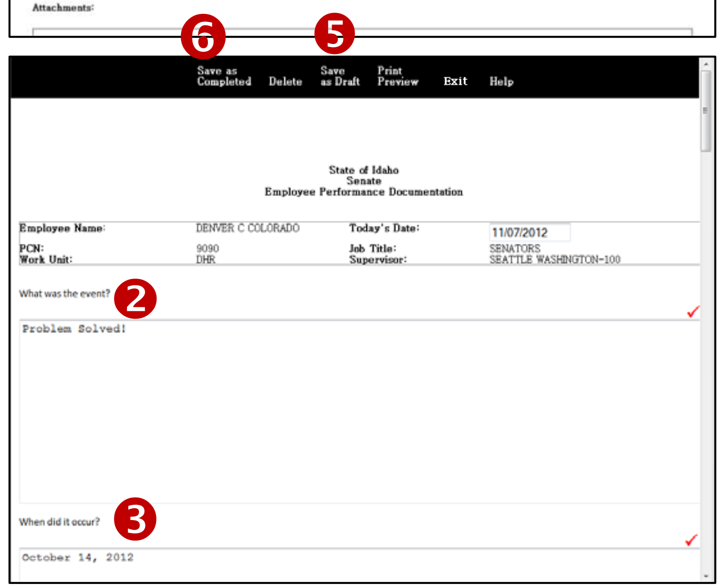

Move to the Create Documentation Tab

## 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.

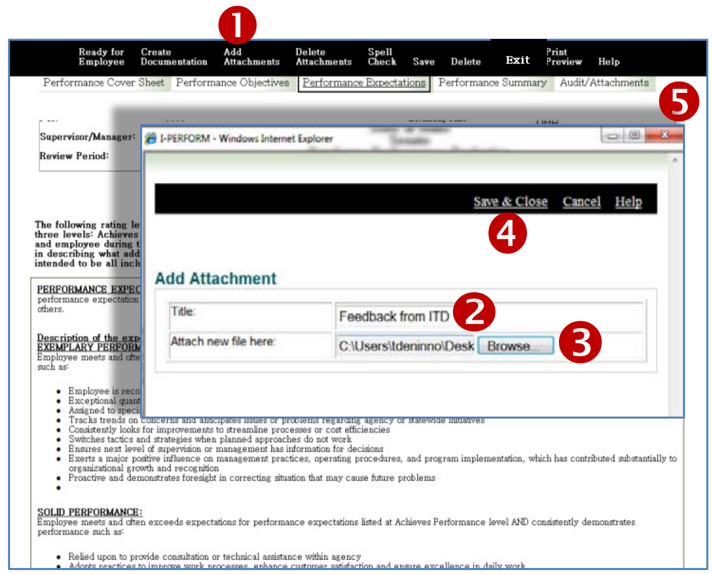


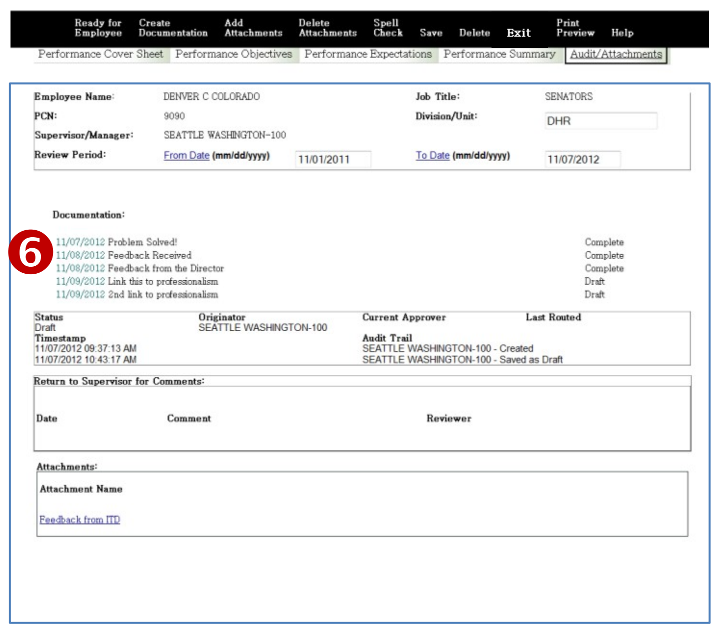

# Add Attachments

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.**

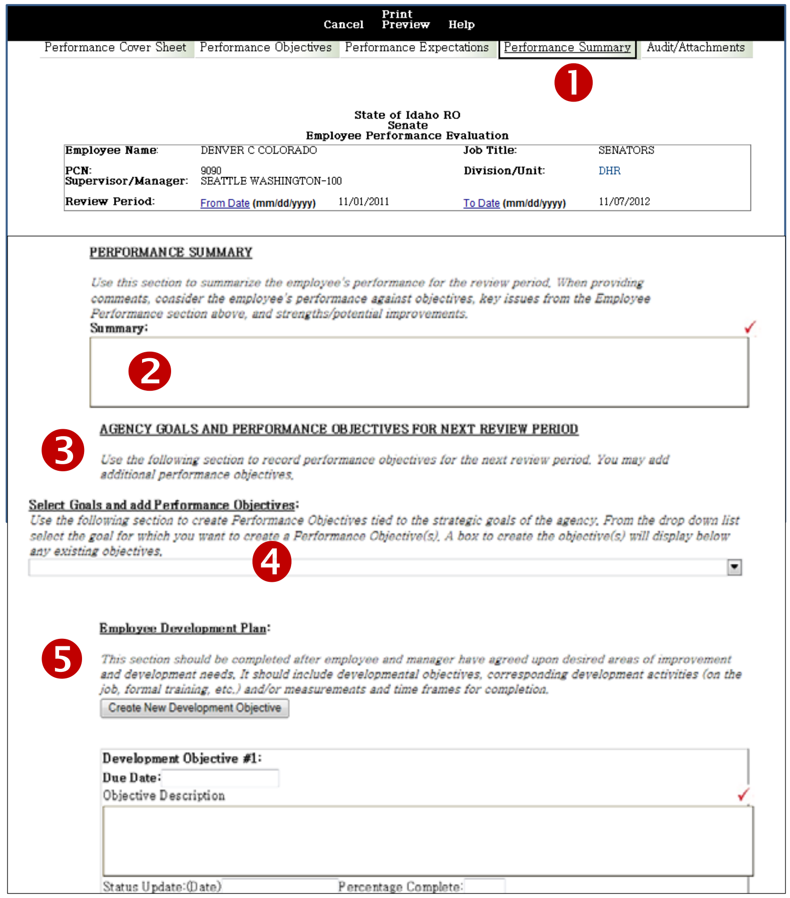



Attachments within the evaluation will be viewable by the employee once the evaluation is complete.




**Move to the Performance Summary Tab**

# Performance Summary

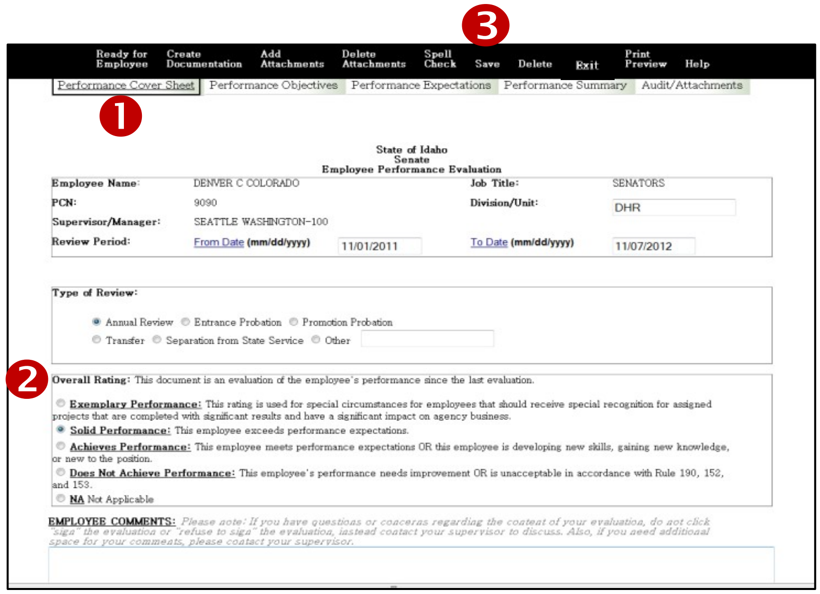



1. Click on the **Performance Summary** tab.
2. Enter **comments** that describe the employee's overall performance in the **Summary** field. Consider all of the expectation areas, ratings assigned, documentation, and other comments. Comments should be specific and reflect all sections of the evaluation.
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.

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.

# Complete Evaluation DRAFT – Cover Sheet

1. Move back to the *Performance Cover Sheet*.
2. Based on the entire evaluation, assign an **Overall Rating** by clicking on the appropriate button.
3. Click **Save**.
4. You can either **close the evaluation** and come back to review it again, OR
5. **Send it for review** according to the routing process of your agency.





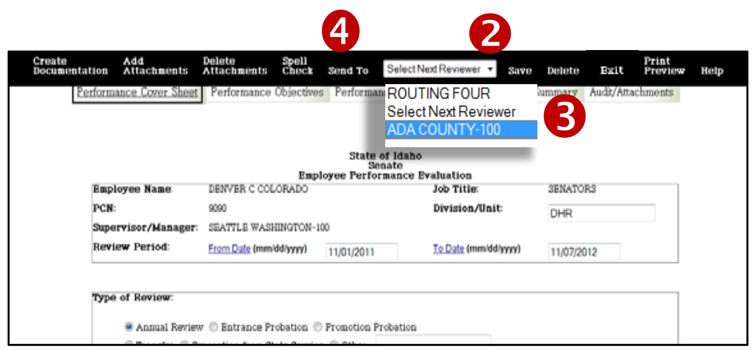
**If the draft is complete…**
**Time to Route for Review!**

## 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.
4. Click on **Send To,** then select **Reviewer Name**. 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.

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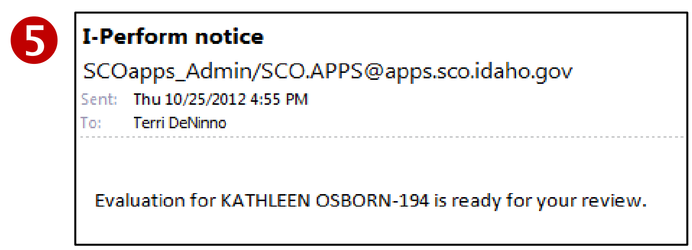
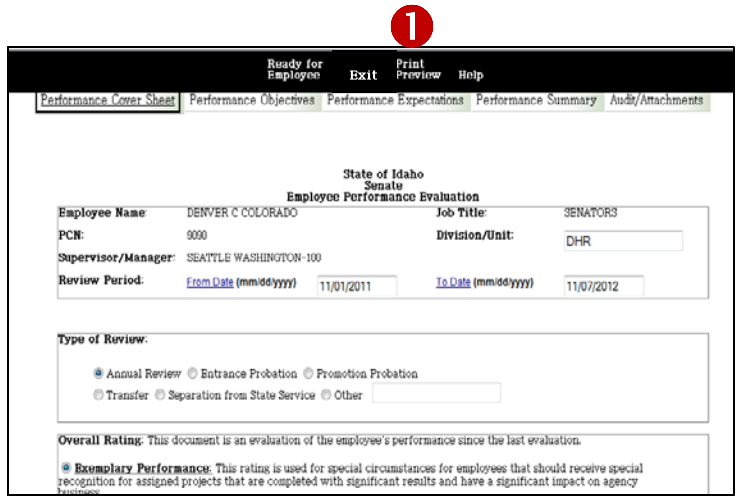



This process could become cumbersome. Avoid this by having a conversation with the reviewer to discuss questions, comments, and/or concerns BEFORE initiating the routing process.

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

## Review of the Draft Evaluation

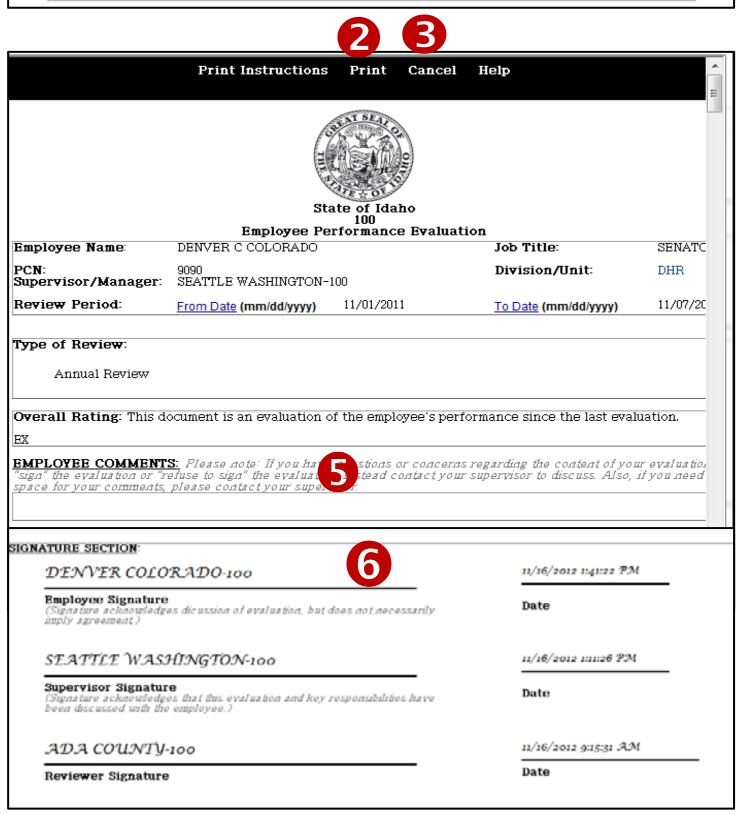
1. When all reviews are done and the evaluation draft is ready, print the evaluation for use during your face-to-face meeting with the employee. Select **Print Preview**. A new pop-up box displays.
2. If the formatting is off, follow the steps outlined in the General Navigation section of this document.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

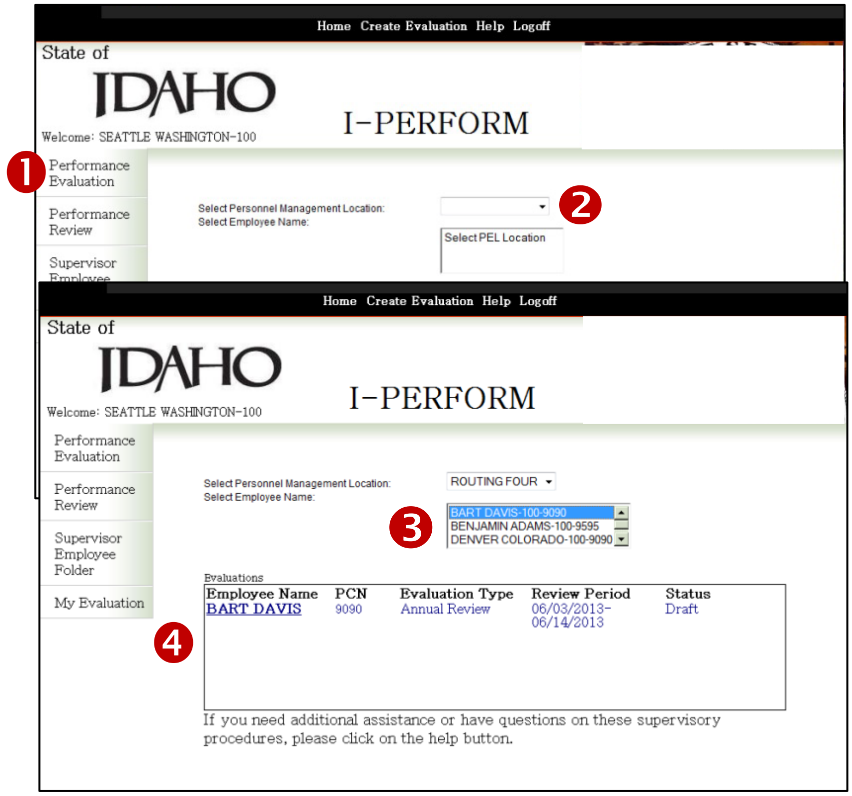
3. Click **Exit** after printing to close the box. After meeting with your employee, make any agreed-upon changes. If changes are made to the evaluation, you will need to re- route to your reviewer again for approval.
4. Send to employee for their final comments and signature by clicking on **Ready for 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.

# 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.




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

## 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:

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| **Draft Status** | **Draft Status indicates the performance evaluation is still in the hands of the supervisor. It will remain in a draft status until the supervisor either sends it for review or sends it to the employee. Anything on the evaluation can be changed by the supervisor at this stage.** |
| **Pending Review** | **Pending Review** indicates the performance evaluation has been routed from the supervisor to any pre-determined reviewers as indicated per agency process. The evaluation will remain in this status until the reviewer routes it back to the supervisor with any comments. While in this stage the supervisor is only able to view and print until rerouted back to the supervisor from the reviewer. |
| **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. |
| **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.** |
| **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.** |
| **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. |
| **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. |
| **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. |

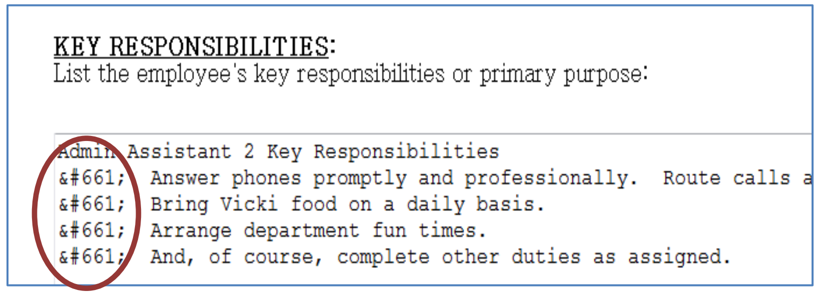
# Tips: Copy and Paste into I-PERFORM

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.




## How To:

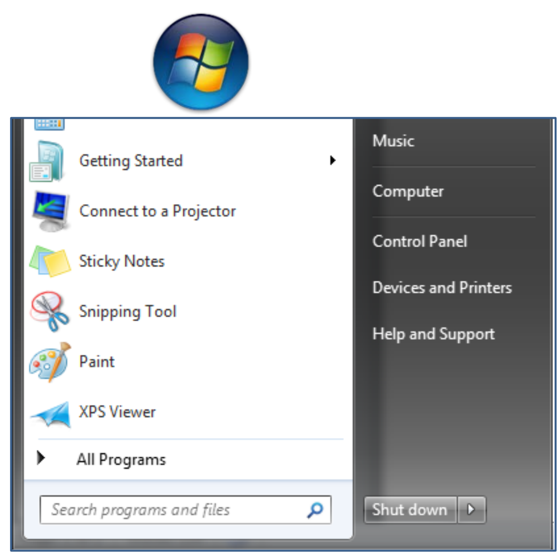
1. Open any document or email that contains information required. Use your Microsoft Word copy feature to select the data you would like to copy.

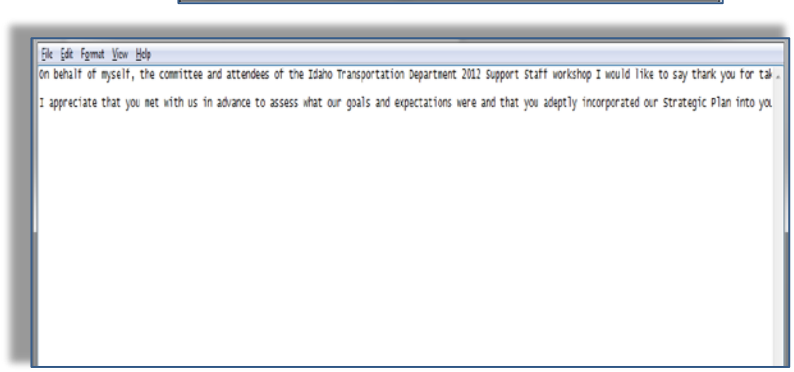
2. Click on the Start icon in the lower left corner of your monitor screen.

3. In the *Search programs and files* field, type **Notepad.**

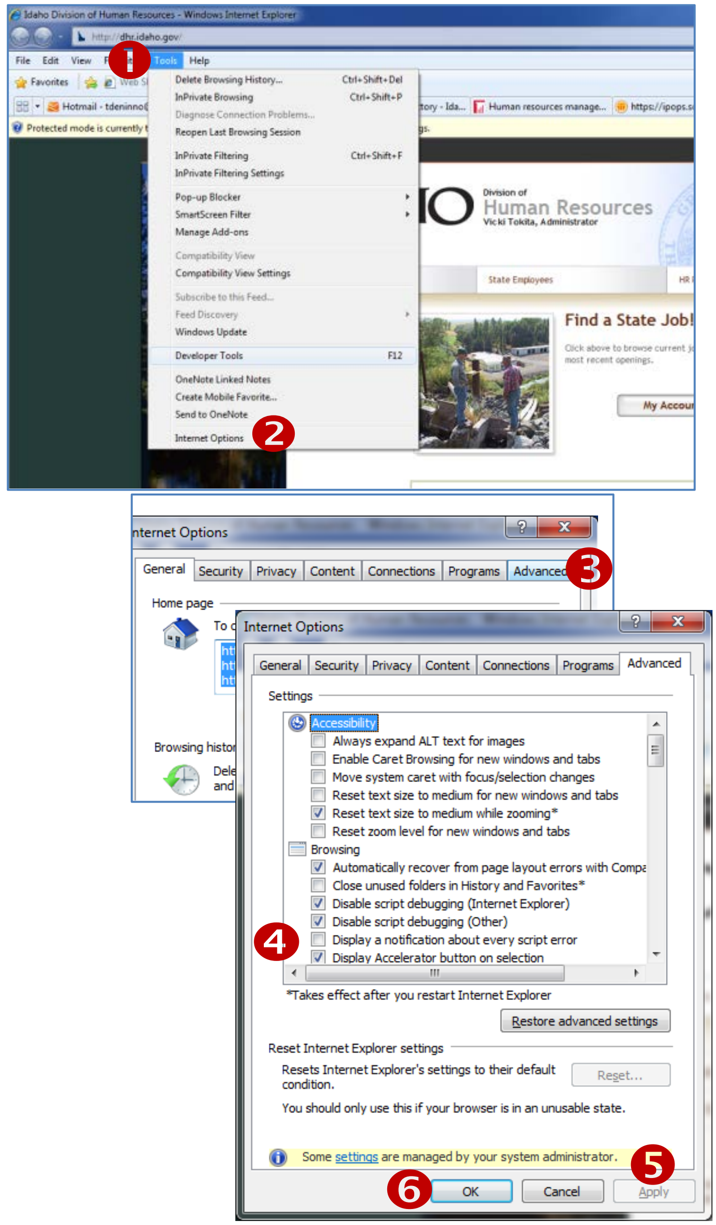
4. A new window will open, allowing you to now paste the information you copied into the open field. You will notice the lack of formatting available.

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

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|---|---|
| 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. |
| PELs | Personnel Employee Location; |
| 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. |