



STATE of GEORGIA PERFORMANCE MANAGEMENT PROCESS

HR Administrator's Participant Guide

March 2009

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Introduction

In 2005 an Inter-agency Performance Management Initiative team was created to determine the needs and requirements for a new performance management system.

A survey of employees, managers, HR personnel and agency leadership was conducted to help determine the needs of the various agencies throughout the state.

The results of this survey, along with research on best practices of performance management processes led the team to create a process that is designed to:

- Establish goals, competencies and performance expectations
- Create measurable criteria
- Align employee goals with agency goals
- Enhance accuracy, consistency and timeliness of reviews
- Capture coaching and feedback on an ongoing basis
- Enable interim feedback throughout the year

The ultimate goal behind the new system is to help ensure that performance management is an on-going process rather than a once a year event and to encourage on-going performance and development conversations between manager and employee.

The Administrator's Guide to the Performance Management has been created to serve as a reference tool to help HR Administrators coordinate the performance management process through the People Soft system throughout the year. The guide will provide you with step by step instructions to initiate the performance management process in your agency to approving the completed annual reviews.

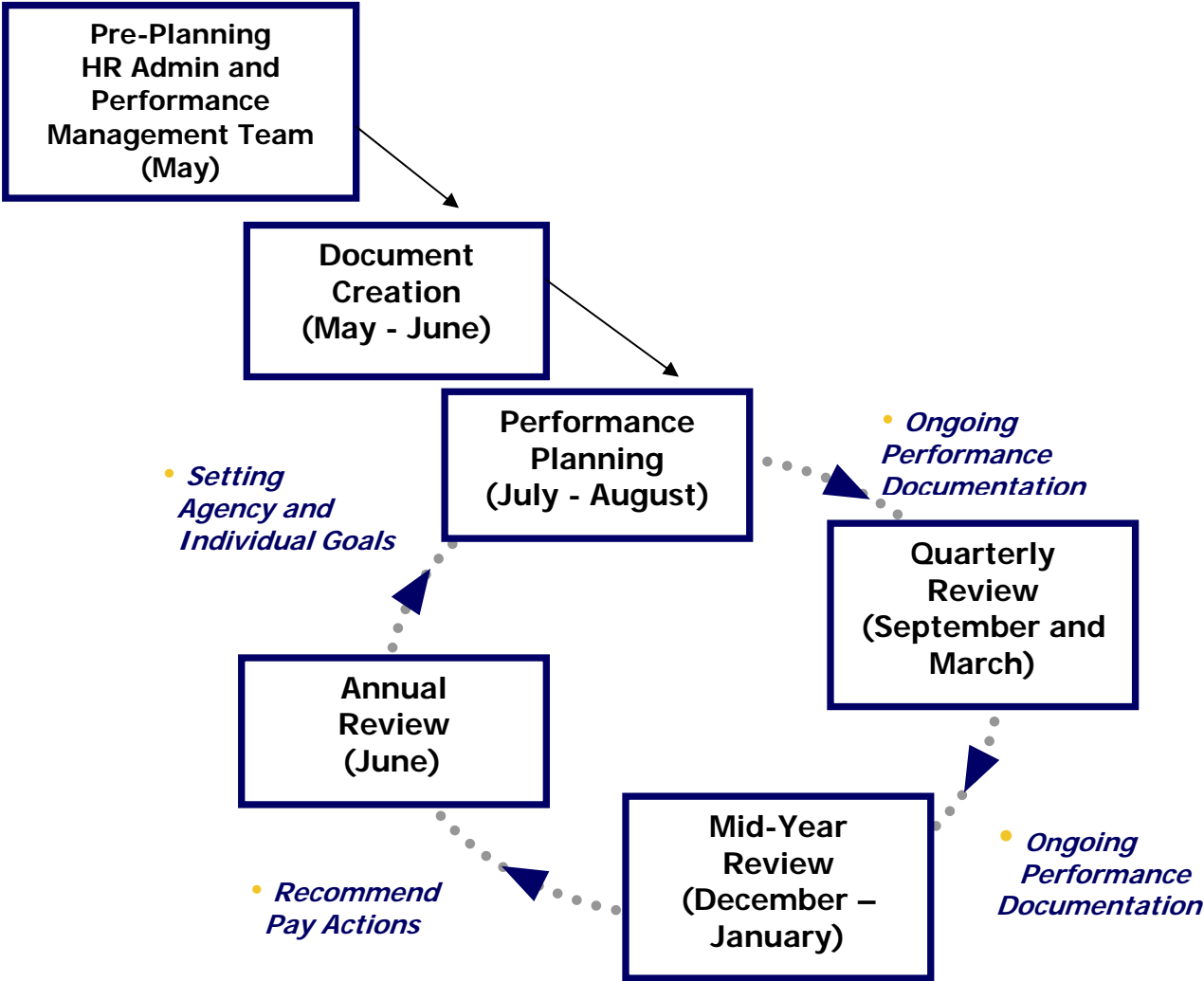
The system is designed to provide a systematic consistent method for administering the performance management process. The tools have been created to help promote continuous performance conversations throughout the year and provide on-going documentation for HR, managers, and employees.

The Performance Management Process

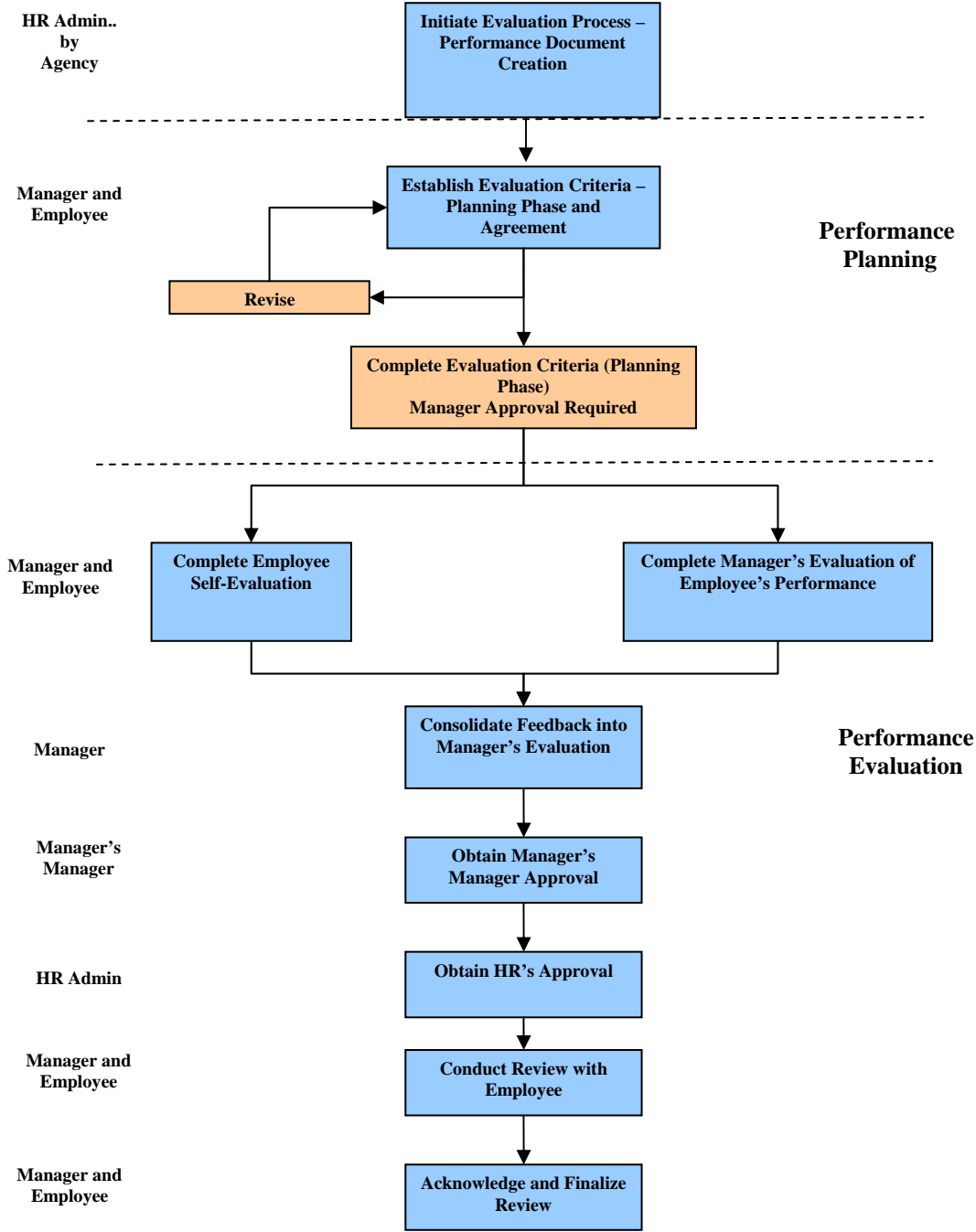
An effective performance management process is structured to ensure two-way communication between a manager and an employee to determine job responsibilities, performance requirements, accomplishments and areas for improvement in meeting job requirements. It is a systematic and iterative process of:

- Performance planning
- Managing performance
- Developing performance
- Rating performance
- Rewarding performance

Although the process of developing performance, coaching and giving feedback can occur at any time, the structured process for managing performance for the State of Georgia employees will occur in the sequence illustrated below.



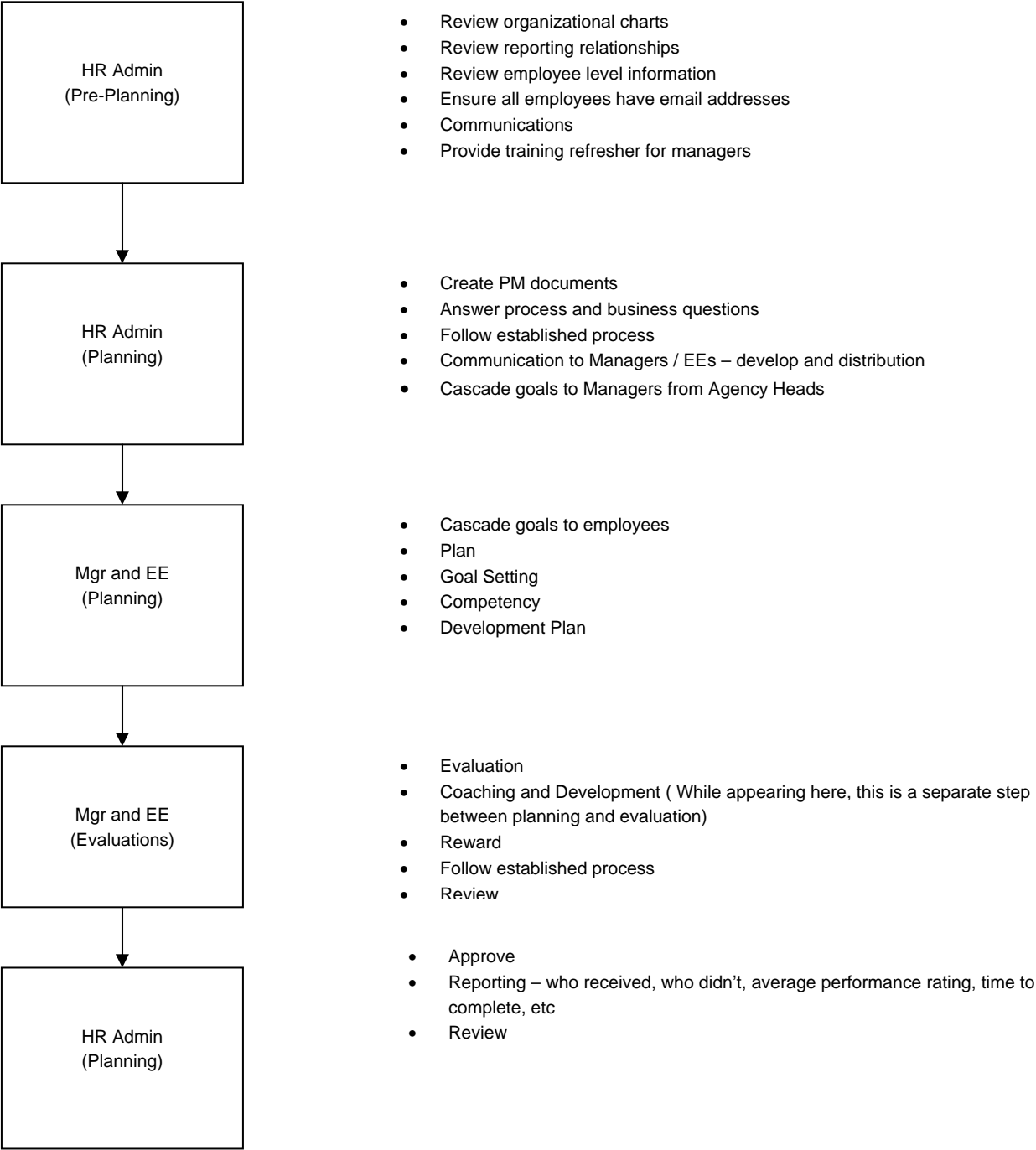
Performance Evaluation Process



Business Process Flow

The Agency HR Administrators are responsible for initiating the performance review process. You create the Performance Documents in the system. After you complete this first step, the system is available to managers and employees for establishing the evaluation criteria, the performance evaluation, entry of feedback and the necessary approvals. The creation of the documents initiates the planning process by creating performance documents and making them available for agency use.

Understanding the Process Flow



How to Use the HR Administrative Reference Guide

The HR Administrative Reference Guide was designed with the user in mind. There are three key components to this guide:

1. Summary of each module
2. Reference to the User Productivity Kit (UPK) tools
3. Step by step guide through the ePerformance system

1. Summary of Each Module:

A summary of each module or section of the guide is provided. This summary describes which step in the performance management process a section correlates to, as well as describes key information needed to perform this step. There are nine modules:

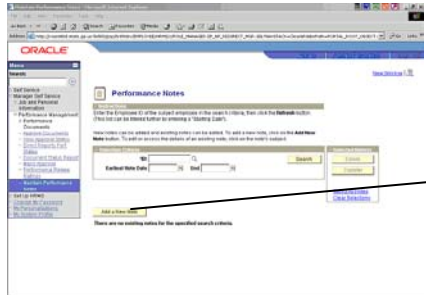
- Module 1: Introduction
- Module 2: Pre-Planning
- Module 3: HR Administrator Document Creation
- Module 4: Planning
- Module 5: Performance Notes
- Module 6: Performance Evaluation – Mid-Year
- Module 7: Performance Evaluation – Annual
- Module 8: HR Administrator Tasks
- Module 9: Reports

2. Reference to the UPK Tool:

The UPK tools are on-line reference documents that can be accessed from various locations. Each step in the ePerformance process has a corresponding UPK. A reference to the UPK and its number identifier will be found at the beginning of each module. Example: The UPK for HR Admin Annual Performance Evaluation Creation is 12.4.1.

3. Step by Step Guide:

This guide serves as an on-going reference tool. It provides an overview of the Performance Management Process, as well as a step by step guide on how to complete all steps in the Performance Management Process. The guide is divided into 2 sections; the left side of the page holds the screen shots for a step, while the right side of the page describes the step and what actions need to be taken at a step. Example from Performance Notes Step 2:

	<p>Step 2</p> <p style="text-align: center;">Add A New Note</p> <p style="text-align: center;">Add a New Note</p> <p>The Id and name is blank since the</p>
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How To Access the UPKs

UPKs (User Productivity Kits) are on-line reference tools that allow a person to follow the performance management process through the new ePerformance system. Each UPK gives step by step directions on how to complete each step in the performance management process.

To access the UPKs go to:

<https://route88upk.state.ga.us>

Once you access the home page it will guide a user through how to access each individual UPK.

The UPK navigation for various lessons of signing into the Portal and Navigating are:

Module 0: Team Works Portal

Lesson 0.1

0.1.1 Team Works Homepage

0.1.2 Portal Navigation

Lesson 0.2 Using the Portal

0.2.1 My Employee Self-Service Page

The UPK reference document is attached. Use this document to identify the UPK storyboard and code associated with that UPK.

Universal Performance Kit(s) Reference Document

12. Module – ePerformance

12.1. Lesson: Annual Performance Evaluation Process

- 12.1.1. Create Annual Performance Evaluation
- 12.1.2. Planning Phase – Manager
- 12.1.3. Planning Phase – Employee
- 12.1.4. Performance Notes – Employee
- 12.1.5. Performance Notes - Manager
- 12.1.6. Performance Evaluation – Employee Self Evaluation
- 12.1.7. Performance Evaluation – Manager Evaluation
- 12.1.8. Approve Evaluation – Manager’s Manager Approval
- 12.1.9. Approve Evaluation – HR Administrator Approval
- 12.1.10. Finalize Evaluation - Manager and Employee
- 12.1.11. Report: Print Performance Evaluation Document
- 12.1.12. Report Manager’s Review Rating
- 12.1.13. Report: Approver’s Review Rating Report
- 12.1.14. Report: Approver’s Doc Status Report
- 12.1.15. Report: HR Admin’s Review Rating Report
- 12.1.16. Report: HR Admin Doc Status Report
- 12.1.17. Review Previously Completed Evaluation

12.2. Lesson: Mid-Year Performance Evaluation Process

- 12.2.1. Create Mid-Year Performance Evaluation
- 12.2.2. Planning Phase – Manager
- 12.2.3. Planning Phase – Employee
- 12.2.4. Performance Notes – Employee
- 12.2.5. Performance Notes - Manager
- 12.2.6. Performance Evaluation – Employee Self Evaluation
- 12.2.7. Performance Evaluation – Manager Evaluation
- 12.2.8. Approve Evaluation – Manager’s Manager Approval
- 12.2.9. Approve Evaluation – HR Administrator Approval
- 12.2.10. Finalize Evaluation - Manager and Employee
- 12.2.11. Report: Print Performance Evaluation Document
- 12.2.12. Report Manager’s Review Rating
- 12.2.13. Report: Approver’s Review Rating Report
- 12.2.14. Report: Approver’s Doc Status Report
- 12.2.15. Report: HR Admin’s Review Rating Report
- 12.2.16. Report: HR Admin Doc Status Report
- 12.2.17. Review Previously Completed Evaluation

12.3 Lesson: Quarterly Performance Evaluation Process

- 12.3.1. Create Annual Performance Evaluation
- 12.3.2. Planning Phase – Manager
- 12.3.3. Planning Phase – Employee
- 12.3.4. Performance Notes – Employee
- 12.3.5. Performance Notes - Manager
- 12.3.6. Performance Evaluation – Employee Self Evaluation
- 12.3.7. Performance Evaluation – Manager Evaluation
- 12.3.8. Approve Evaluation – Manager’s Manager Approval

- 12.3.9. Approve Evaluation – HR Administrator Approval
- 12.3.10. Finalize Evaluation (Manager and Employee)
- 12.3.11. Report: Print Performance Evaluation Document
- 12.3.12. Report Manager's Review Rating
- 12.3.13. Report: Approver's Review Rating Report
- 12.3.14. Report: Approver's Doc Status Report
- 12.3.15. Report: HR Admin's Review Rating Report
- 12.3.16. Report: HR Admin Doc Status Report
- 12.3.17. Review Previously Completed Evaluation

12.4 Lesson: HR Administrator Administration

- 12.4.1. Create Annual Performance Evaluation
- 12.4.2. Create Mid-Year Performance Evaluation
- 12.4.3. Create Quarterly Performance Evaluation
- 12.4.4. Cancel Performance Documents
- 12.4.5. Delete Performance Documents
- 12.4.6. Transfer Performance Documents
- 12.4.7. Reset Document Status
- 12.4.8. Missing Document Reports
- 12.4.9. Late Document Reports

TIMELINE PROCESS												
GROUP TO TAKE ACTION	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
HR Admin Pre-Planning			Conduct an Organizational Review Process to Begin the Performance Period *									
HR Admin Document Creation					Create Agency Documents for Current Year Performance Evaluations							
Manager / Employee Planning						Complete Performance Planning for Upcoming Performance Year						
Manager / Employee / Evaluations	Hold Mid-Year Evaluation Discussions and Approval Process Completed for Mid-Years		Hold Qtrly Reviews and Approval Process Completed for Qtrly**			Complete Annual Review and Approval Process for Current Year		Hold Performance Discussions for Current Year	Hold Qtrly Reviews and Approval Process Completed for Qtrly			Complete Mid-Year Review Documentation
Salary Review											Salary Recommendations review with Agency Head	Salary Recommendations review with Agency Head

Review organizational charts, Review reporting relationships, Review employee level information, Ensure all employees have email addresses, Communicate, and provide training refresher for manager. Quarterly reviews are at agency's discretion.*