Performance Management
Instructions for Employees (Planning and Evaluation)
2018
Performance Planning
Information contained in this presentation will provide you with information needed to complete your performance planning and evaluation responsibilities in regard to your individual performance plan and evaluation.

The performance year is from July 1st – June 30th. It is not a calendar year.

Each salaried employee must receive a performance plan.
- Performance Planning (performance plan development) will take place in June - July.

Performance is evaluated twice per year.
- 1. The Annual evaluation covers the entire performance year and is completed in July.
- 2. The Mid-Year evaluation covers the first 6 month period of the performance year (July 1st through December 31st).

Each employee has a role in Planning and Evaluation.
# Performance Planning
(Instructions for Employees)

## Performance Management Process Timeline
(Employee Responsibilities)

<table>
<thead>
<tr>
<th>Planning</th>
<th>Coaching</th>
<th>Evaluation (Mid-Year)</th>
<th>Coaching</th>
<th>Evaluation (Annual)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>June – July</strong></td>
<td><strong>July – December</strong></td>
<td><strong>January – February</strong></td>
<td><strong>January – June</strong></td>
<td><strong>July - August</strong></td>
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<tr>
<td>Think about performance goals.</td>
<td>Collaborate with Manager to develop Performance Plan.</td>
<td>Begin plan execution.</td>
<td>Execute the plan.</td>
<td>Face-to-Face meeting with Manager to discuss Mid-Year progress.</td>
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<td>Acknowledge review of the Plan.</td>
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<td>Execute the plan.</td>
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<td>Acknowledge review of the Plan.</td>
</tr>
</tbody>
</table>
What must the employee do in June and July during Performance Planning?

- Access and review the performance plan via TeamWorks Employee Self Service when the supervisor notifies you that the plan is ready for review. (https://route88.state.ga.us)

- Meet face-to-face with the manager to discuss the performance plan.
Log into TeamWorks using your Employee ID and Password. Use [https://route88.state.ga.us](https://route88.state.ga.us) to log on. If you forgot your password click on the ‘Reset/Forgot your password?’ link or go to information on the DNR intranet at: [http://dnrintranet.org/hr/employee-self-service-and-manager-self-service](http://dnrintranet.org/hr/employee-self-service-and-manager-self-service).
Completing Evaluations
(Accessing the Evaluation)

Click on the following cascade of menu options to get to your performance plan:
1. Main Menu
2. Self Service
3. Performance Management
4. My Performance Documents
5. Current Documents
Click on the ‘Annual Performance Review’ link.
Click on ‘Expand All’ to view the entire performance plan.

Do not click on ‘Complete Self Evaluation’. DNR does not use the Self Evaluation. Beginning the Self Evaluation during performance planning may cause the performance plan to lock and the supervisor will no longer be able to access the plan.
Review the performance plan. Use the scroll bar on the right to scroll through each of the following sections of the performance plan:

1. Core/Ind. Competencies
2. Individual Goals
3. Job Responsibilities
4. Individual Development Plan
Performance Planning
(Instructions for Employees)

Once you have reviewed all four sections of the plan, your manager will schedule a face-to-face planning meeting with you. The manager will discuss the plan with you, and will notify you of their expectations for the performance year. Your feedback is expected and the manager may make any reasonable changes to the plan that are requested. The manager and the employee should sign a copy of the annual performance plan. The signed plan is kept by the manager in the local management file.

This completes the employee’s responsibilities for the Performance Planning phase of performance management.
Performance Evaluation
What must the employee do in July and August during Annual Performance Evaluation?

• Meet face-to-face with the manager to discuss the performance evaluation.
• Access and review the performance evaluation via TeamWorks when the supervisor notifies you that the performance evaluation has been approved by the Office of Human Resources and the evaluation is ready for your review.
• Acknowledge the performance evaluation in TeamWorks Employee Self Service.
• Your manager will request that you meet with him/her face-to-face regarding the performance evaluation. In the meeting, you will be given a hardcopy of your annual evaluation and will discuss it with your manager.

• After meeting with your manager, he/she will ask you to access TeamWorks Employee Self Service (ESS) to acknowledge the evaluation. This requires that you access your performance document through ESS as shown in the next few slides.
Log into PeopleSoft using your Employee ID and Password. Use [https://route88.state.ga.us](https://route88.state.ga.us) to log on. If you forgot your password click on the ‘Reset/Forgot your password?’ link or go to: [http://dnrintranet.org/hr/employee-self-service-and-manager-self-service](http://dnrintranet.org/hr/employee-self-service-and-manager-self-service).
Completing Evaluations
(Accessing the Evaluation)

Click on the following cascade of menu options to get to your performance plan:
1. Main Menu
2. Self Service
3. Performance Management
4. My Performance Documents
5. Current Documents
Review the document and Click the ‘Acknowledge’ button. Then click the ‘Confirm’ button.
If you return to the current documents screen, you will see that the document status has changed to Acknowledged. You have successfully acknowledged your performance evaluation. Notify your manager that your acknowledgement is complete and that he/her will need to access the evaluation to click on complete, confirm and save to ensure it is completed in the system.
At this point your supervisor will finalize the performance evaluation in TeamWorks.

Sign and date your evaluation if it is not signed with an eSignature.

This completes the employee’s responsibilities for the evaluation phase of performance management.