Developing Employee Performance Plans

Instructions for *Cloning* Existing Performance Plans and *Creating* New Template Plans

2019
Steps for Performance Cloning
(Instructions for Managers)

- Each year during June – July, managers must develop a new performance plan for each of their employees.
- The ePerformance cloning feature allows managers to duplicate a performance plan from one year and use it for the next performance year, requiring minimal modification to the cloned plan.
Steps for Performance Cloning  
(Instructions for Managers)

- Performance plans can only be created from the same document type (i.e. Annual plan to Annual plan).

- This document is intended to provide a quick reference guide regarding cloning and creating template plans. If more detailed training is needed, please access the State Accounting Office TeamWorks on-line training at https://sao.georgia.gov/teamworks-hcm-online-training.
Steps for Performance Cloning
(Instructions for Managers)

STEP 1: After signing on to TeamWorks at https://hcm.teamworks.Georgia.gov click on ‘Main Menu’ to reveal the menu options.
Steps for Performance Cloning
(Instructions for Managers)

STEP 2: Click on the following cascade of menu items to access the performance documents of employees who report to you:

- Manager Self Service
- Performance Management
- Performance Documents
- Create Documents

You are now ready to clone performance plans for one or all of your direct reports.
Steps for Performance Cloning
(Instructions for Managers)

1. The system will default to the current date. This date should not be changed.

2. Click the box to select the employees for which you want to clone a performance plan. Choose ‘Select All’ if you want the same cloned performance plan to apply to all employees that you supervise. This ‘select all’ feature is helpful if you have several employees and they are all in the same job title.

3. Click ‘Continue’.

Note: All of your direct reports should be listed. If they are not, be sure to clear your cache and be sure that you are in compatibility view if using Internet Explorer. For additional guidance see the ePerformance Troubleshooting guide at: https://dnrintranet.org/sites/default/files/dnrnet/pdf/ePerf%20Troubleshooting%20for%20Managers%2052019.pdf and Browser Issues at: https://dnrintranet.org/sites/default/files/dnrnet/pdf/Browser%20issues%2052019.pdf. If your direct reports are still not listed, contact your Division HR Representative.
Steps for Performance Cloning
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1. Enter the period begin and period end date. Remember that these dates for an annual plan MUST ALWAYS BE 7/1 – 6/30. Annual documents must be created with a performance period that mirrors the fiscal year (i.e. 7/1/2019 - 6/30/2020) ONLY FISCAL YEAR DATES SHOULD BE ENTERED HERE even if the employee did not work for DNR for the entire evaluation period or the current manager did not supervise the employee for the entire evaluation period. Do not use dates other than fiscal year dates to avoid multiple plans being created.

3. Select ‘Yes’ to clone from prior performance plans.
4. Click on the magnifying glass. Clicking here will provide a list of all previous performance plans for your direct reports. Select one of the performance plans to clone. When a performance plan is cloned, it must be a 2016-2017 or later plan.

5. Click ‘Create documents’.
Steps for Performance Cloning
(Instructions for Managers)

STEP 5: The result of cloning will appear here. If the document was successfully created, ‘Yes’ will appear in the Successful Creation column and ‘Document created successfully’ will appear in the Status column and the newly created document(s) will appear in your list of Current Performance Documents.

You are now ready to begin modifying the cloned performance plan if needed (performance planning). You may click on ‘Current documents’ to access the newly cloned document.

For instructions regarding performance planning, see information on the DNR intranet in the Human Resources > Performance Management section at http://dnrintranet.org/hr/performance-management.
Instructions for Completing a Template Performance Plan
A manager may choose to create a template performance plan instead of cloning an existing plan. To create the template plan, log in to TeamWorks/PeopleSoft using https://hcm.teamworks.Georgia.gov as shown in Step 1 above. Navigate TeamWorks by clicking on the cascading menu of links as shown in Steps 2 and 3 above. Once you have navigated to the Create Performance Documents screen, select the employee for whom you want to create a performance plan by clicking in the box next to their name and then select ‘Continue’.
Steps for Creating a Template Performance Plan (Instructions for Managers)

To enter the parameters for creating the performance plan, complete the same steps for the period begin date and the period end date (must be FY 7/1 – 6/30) and the document type (Annual) as shown in Step 4 above. However, you will answer, ‘No’ in the field requesting if you would like to clone from a prior document. You will also indicate that the Template will be the ‘Annual Performance Review’.

Next, click on the ‘Create Documents’ button and you will see a message that shows that the document has been successfully created. The document you have created will not be a cloned document but will be a template document that reflects the generic duties and responsibilities from the job description. The manager will then begin to customize the performance plan (performance planning). See Performance Planning Instructions for Managers for information regarding how to proceed with planning at: http://dnrintranet.org/hr/performance-management.