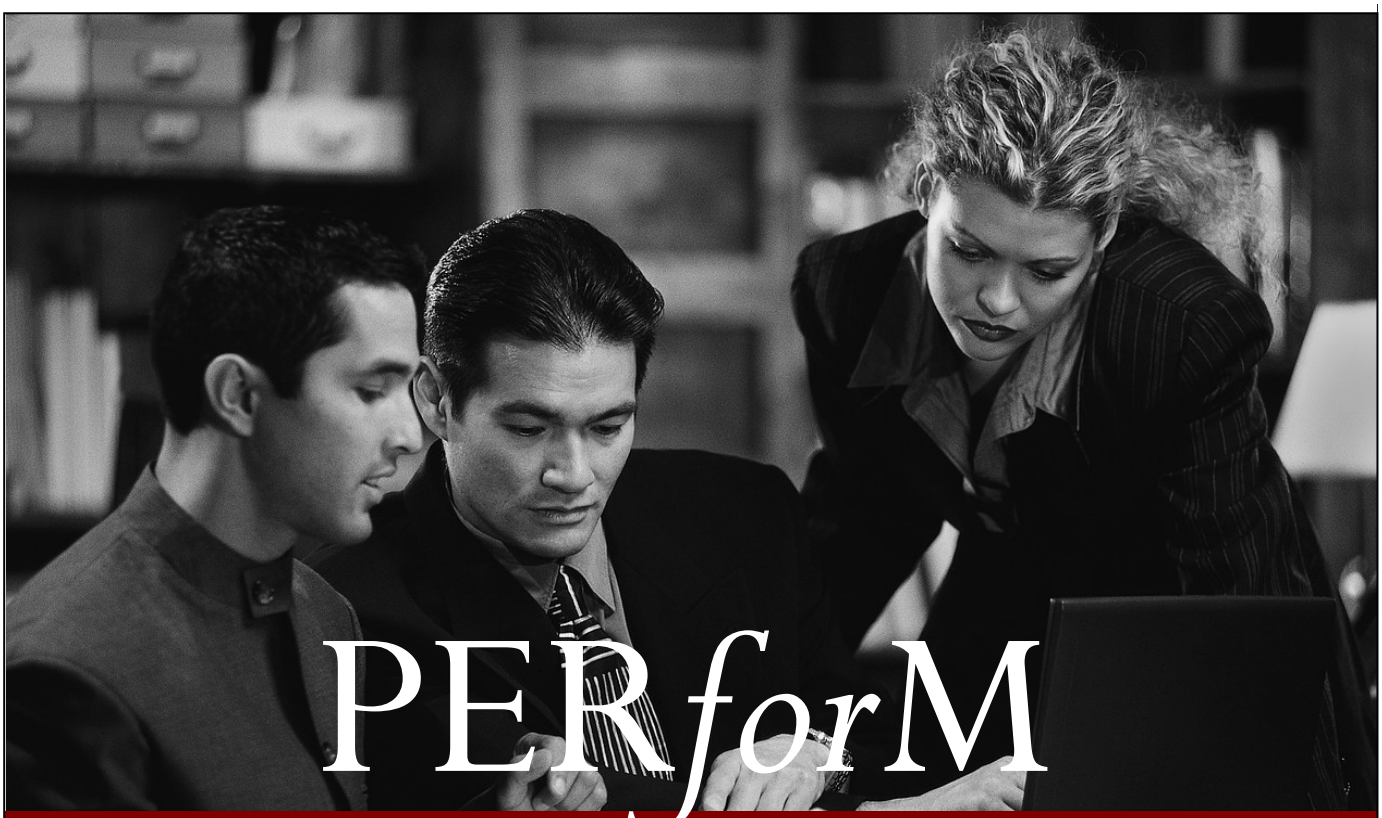

# PERforM

## Screens and Functions

The Missouri State Employee Online Performance Appraisal System

PERforM

Productivity, Excellence and Results for Missouri

## A Supplemental Guide


Developed By:

State of Missouri

Office of Administration

Division of Personnel

**www.perform.mo.gov**



Last Updated: October 31, 2008

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# Logging-On to PERforM

## Log-On Entry Fields

When the “Log-on to PERforM” button (or other means) is used to access the PERforM system, the User is usually first taken to the following screen.

The first entry field is “**User name**” and is comprised of the User’s domain followed by a backslash and then their userid. The entry format is domain\userid.

Based upon the User’s agency and/or division, the domain will *typically* be one of the options listed below. However, there are some exceptions.

**ADS**
Agriculture
Corrections
Economic Development
Revenue
Higher Education
Insurance
Labor & Industrial Relations
Natural Resources
Professional Registration Commission

**BDS**
Elementary & Secondary Education
- School for the Blind
- School for the Deaf
- Vocational Rehabilitation

Office of Administration
Public Safety

**CDS**
Health & Senior Services
Mental Health
Social Services

**Jackpot**
Lottery

**MOPSC**
Public Service

The userid, in many instances, is the first 5 letters of the User’s last name and the first letter of their first name.

To verify “**User name**,” normally the User can refer to “Logon Information” which is displayed on their work computer by pressing the Alt, Ctrl, and Delete keys simultaneously.

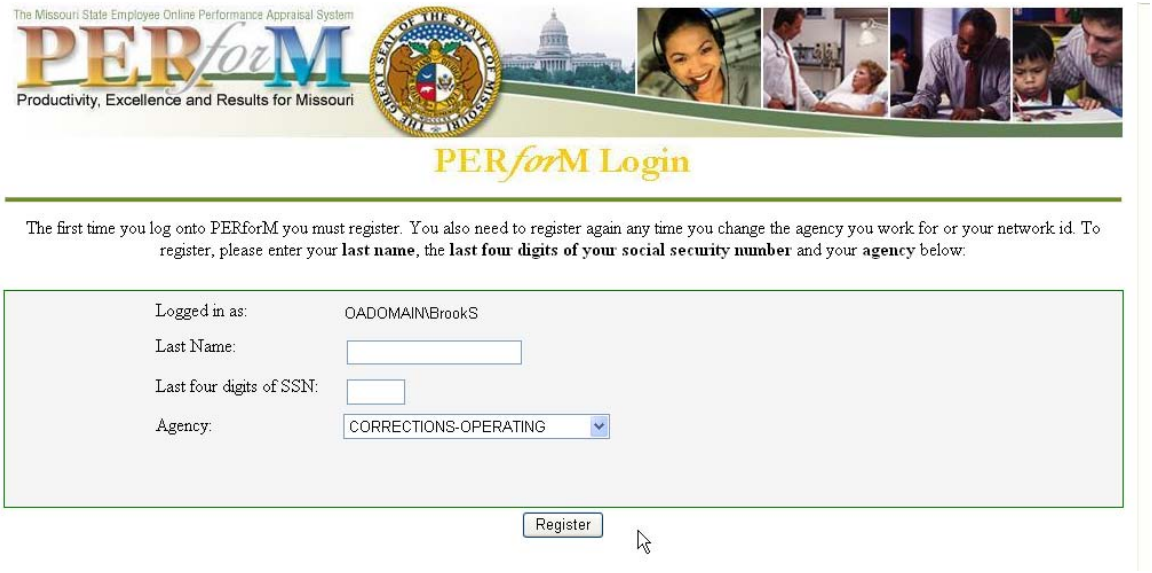
The second entry field is “**Password**” and generally is the same password the User enters to log-on to their work computer.

## Registration

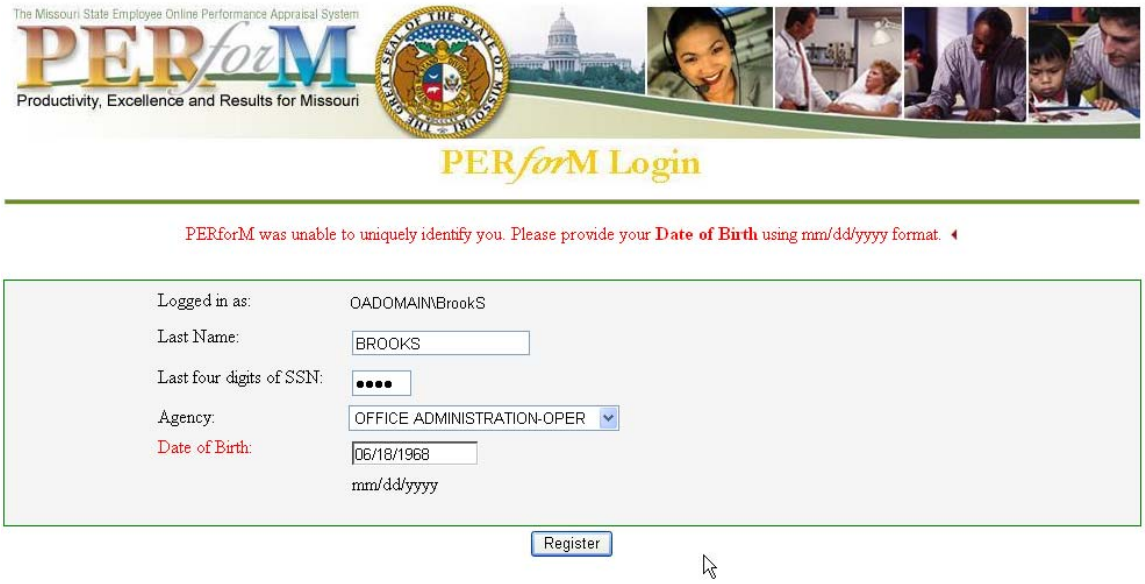
To uniquely identify all PERforM users, the first time a User logs on to the PERforM system, he/she is required to register. Users will not have to repeat this process unless their "**User name**" or the agency they work for changes.

To register, the User provides:

- Their last name
- The last four digits of their Social Security Number; and
- Their agency

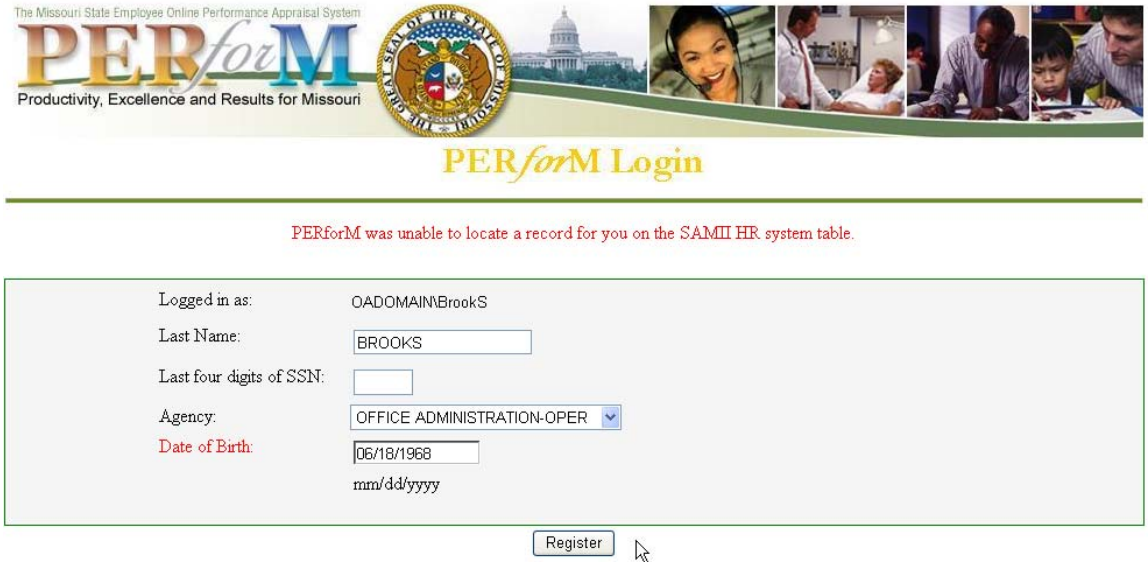



If the system cannot uniquely identify the User with these three (3) pieces of data, the system will ask for their date of birth.



Once the Rater has successfully logged on to PERforM, they are able to access their Home Page.

If the system cannot uniquely identify the User, he/she must contact his/her agency Human Resources (HR) Office for assistance.



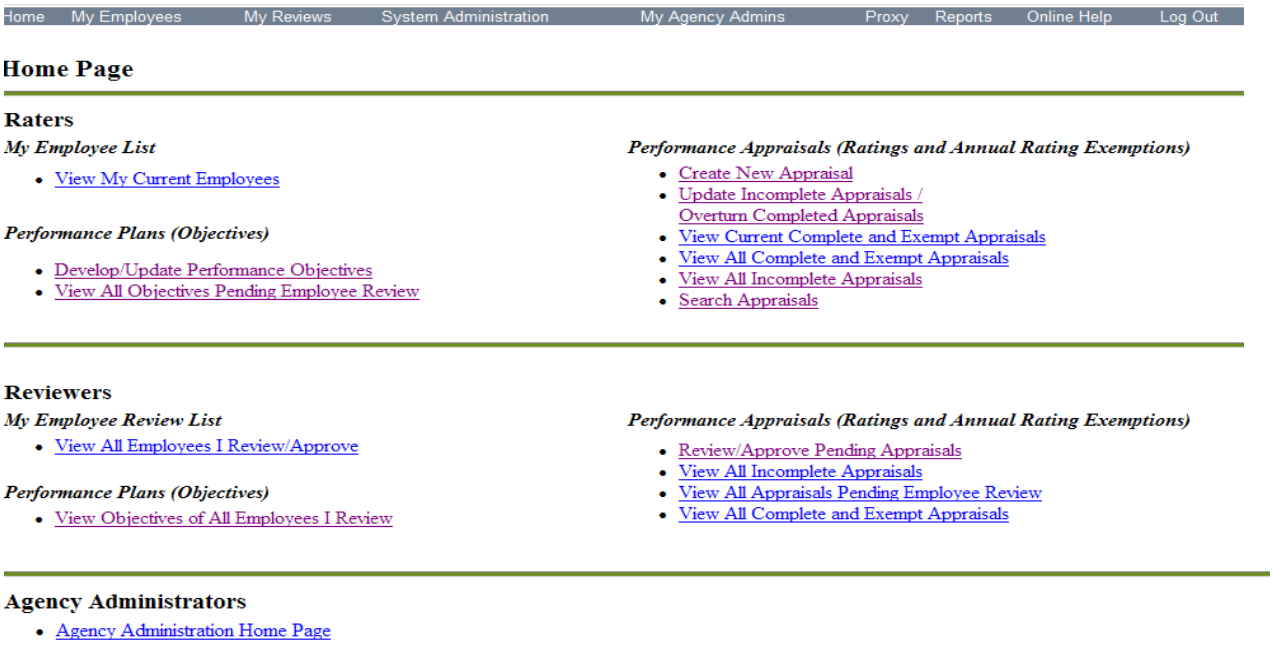

HR can verify that the data entered in the SAM II-HR system for the User is correct.

If for any reason HR cannot help the User, a representative of that office will contact the System Administrator (in the Office of Administration, Division of Personnel) for assistance.

# Navigating from the User's Home Page

The User's Home Page provides access to all functions available to the User based on his or her role/s (Rater, Reviewer, System Administrator, Agency Administrator, Delegate Rater, and/or Proxy). Home Page functionality includes clickable links on **action words** (*Develop/Update* Performance Objectives, *Create* New Appraisals, *View/Update* Appraisals, etc.) that navigate the User to other screens in PERforM where the selected action is completed.

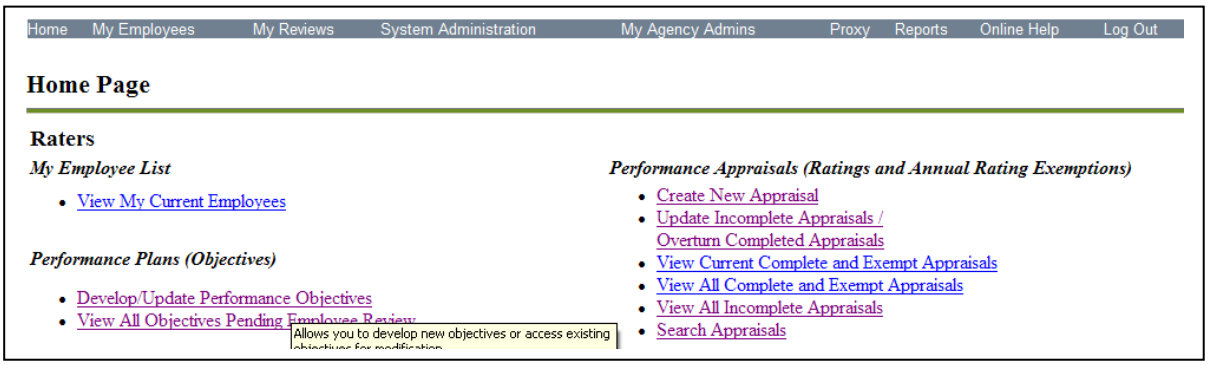
The menu bar on the Home Page is populated based on the User's role/s. The screen print below shows what a Home Page would look like if a User had many designated roles. In this example, the User has menu items for Rater, Reviewer, and Agency Administrator roles.



# Creating and Updating Objectives for Performance Components

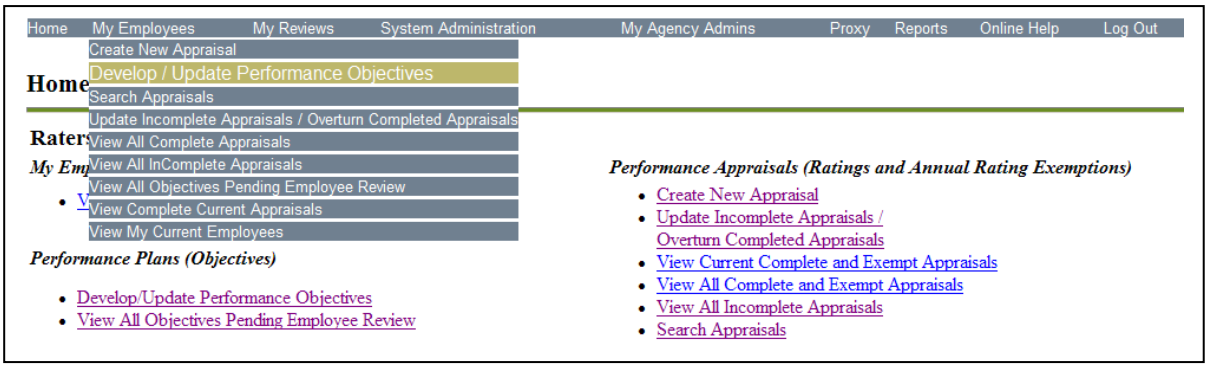
There are two ways in which a Rater can begin the process of developing and updating performance objectives for an employee. From the Rater's Home Page, the Rater can

1. Use the clickable link on the action word 'Develop/Update Performance Objectives.'

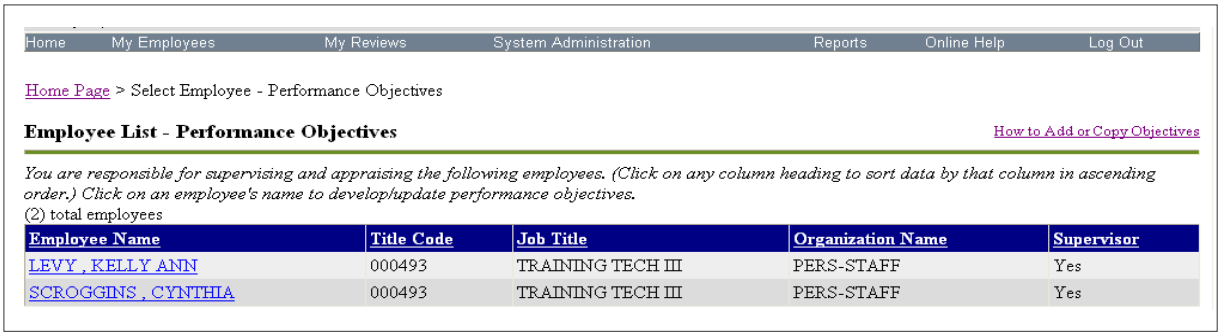



OR:

2. Select 'Develop/Update Performance Objectives from the My Employees drop-down menu.

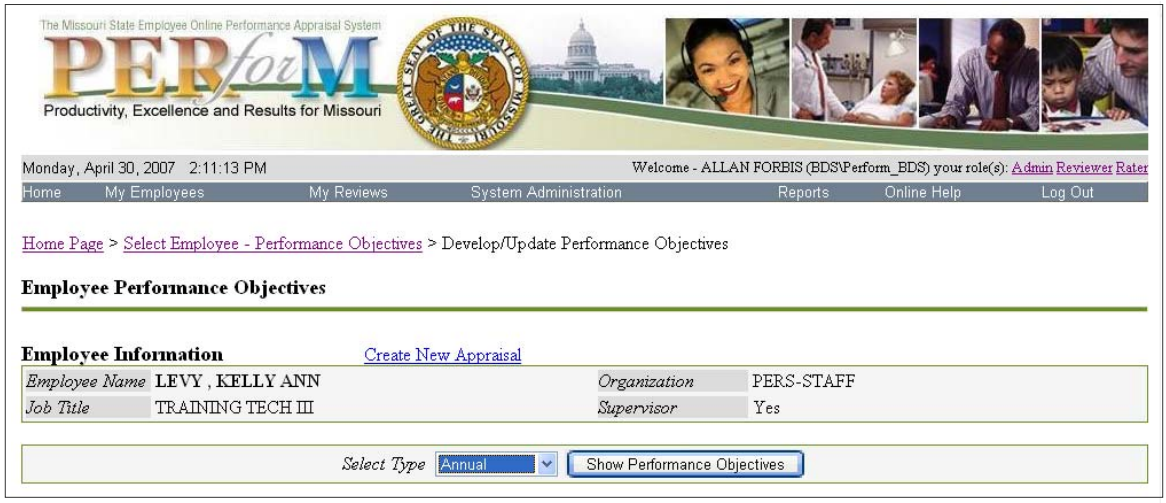



Once the Rater selects (clicks) either link, the Rater will be taken to the Employee List – Performance Objectives page. This page displays a list of the employees supervised by the Rater.

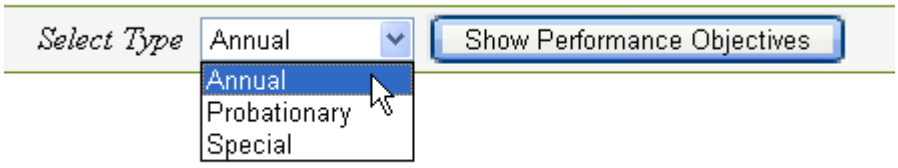



| Employee Name | Title Code | Job Title | Organization Name | Supervisor |
|---|---|---|---|---|
| LEVY , KELLY ANN | 000493 | TRAINING TECH III | PERS-STAFF | Yes |
| SCROGGINS , CYNTHIA | 000493 | TRAINING TECH III | PERS-STAFF | Yes |

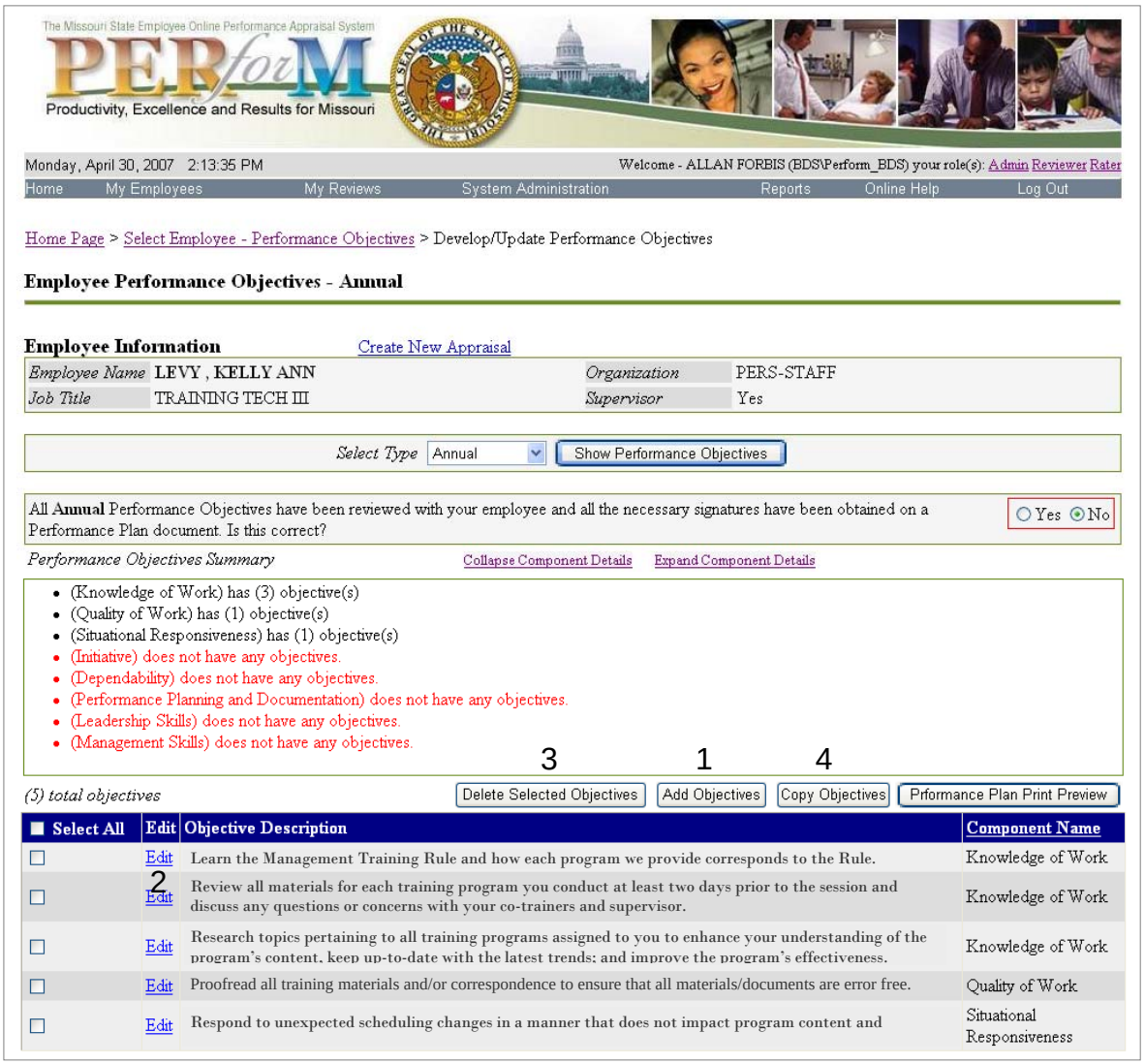
Once the Rater clicks on the name of the employee for whom he/she wishes to add/edit objectives, the Rater will view the Develop/Update Performance Objectives page.




From this page, the Rater must select the type of appraisal to work with (Annual, Probationary or Special) and then click the 'Show Performance Objectives' button to proceed.



After the selection has been made and the 'Show Performance Objectives' button has been clicked, the Rater will view the Employee Performance Objectives page which displays the selected employee's objectives and provides options to add, edit, delete, or copy objectives.




The PERforM system provides individual windows for four specific performance objective actions:

1 Add objectives

2 Edit objectives

3 Delete objectives

4 Copy objectives

## Adding Objectives

To add objectives, the Rater will click the “Add Objectives” button. When the “Add Objectives” button is clicked, the Add Performance Objectives page is opened. The Rater can add new objectives on this page by typing in the objective description, choosing a performance component from the drop-down list and clicking either **“Save”** or **“Save & Add More**.**”**

When the Rater clicks **“Save**,**”** the new objective will be saved to the database and a message appears which indicates that the objective has been successfully added. The new objective appears in a list on the right side of the page so that the Rater can see what objective they have added.

When a Rater clicks **“Save & Add More,”** the new objective will be saved to the database and the objective description will be cleared out allowing for another objective to be added. A message will appear indicating that the objective has been successfully added.

When the Rater goes back to the Develop/Update Performance Objectives page, he or she can see all of the objectives they have assigned to the employee for the type of appraisal (Annual, Probationary or Special) they are working with.

## Editing Objectives

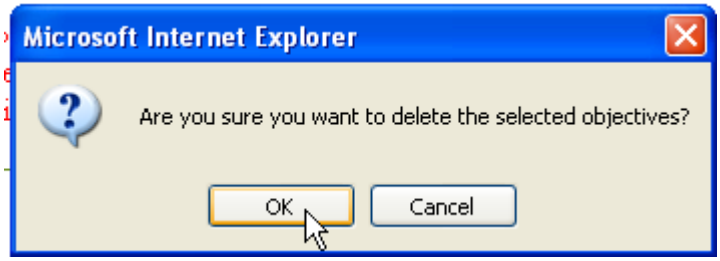
When the “Edit” hyperlink is selected next to an existing objective on the Develop/Update Performance Objectives page, a new window opens. On the “Edit Performance Objectives” page, the Rater can alter the objective description or change the component that the objective is associated with.

## Deleting Objectives

To delete an objective, click in the check box next to the objective on the Develop/Update Performance Objectives page and then click the “Delete Selected Objectives” button:

If a Rater wants to delete all the objectives, he or she can click the check box next to the words “Select All” and then click the delete selected objectives button.

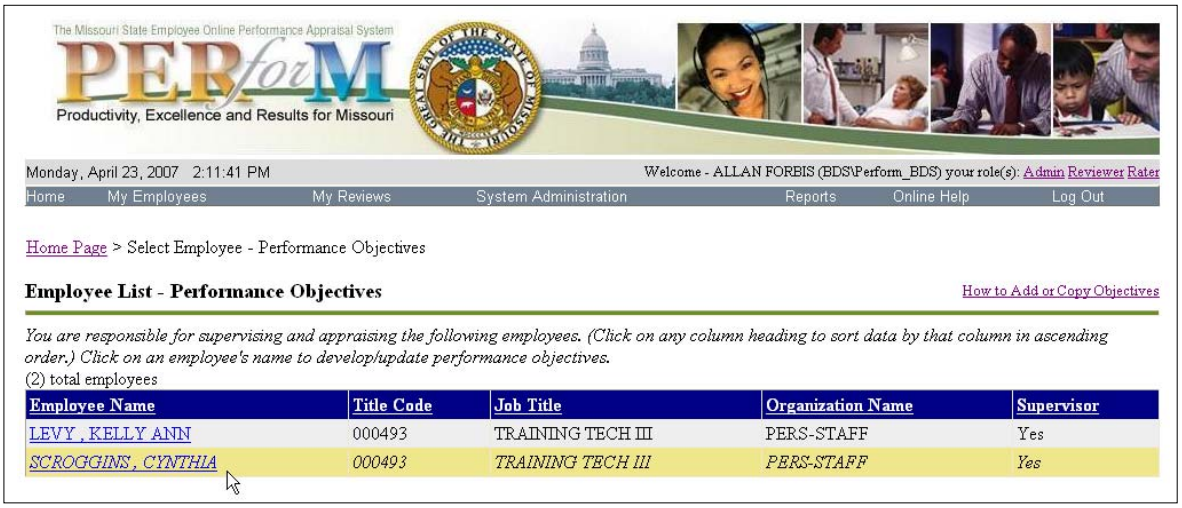
When one or more objectives are selected to delete, a confirmation message will be displayed. Click “Ok” to delete the selected objectives:




A message will be displayed indicating the objectives were successfully deleted and the page is refreshed.

## Copying Objectives

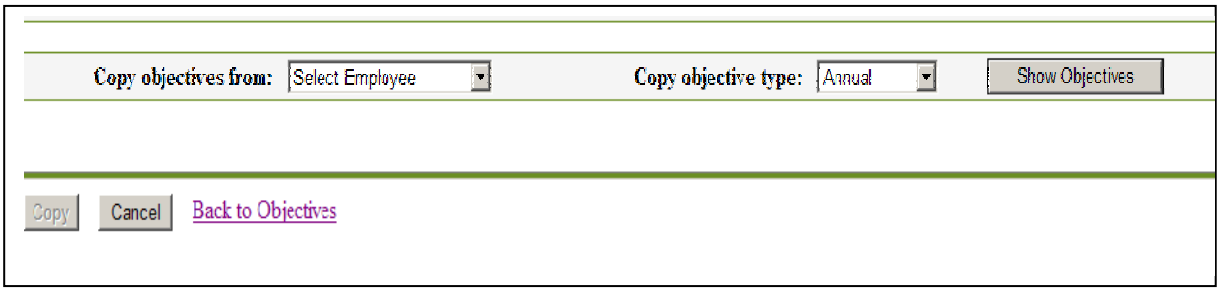
To initiate this function, the Rater must first select the employee for whom they want to create objectives for from their employee list on the Performance Objectives page.



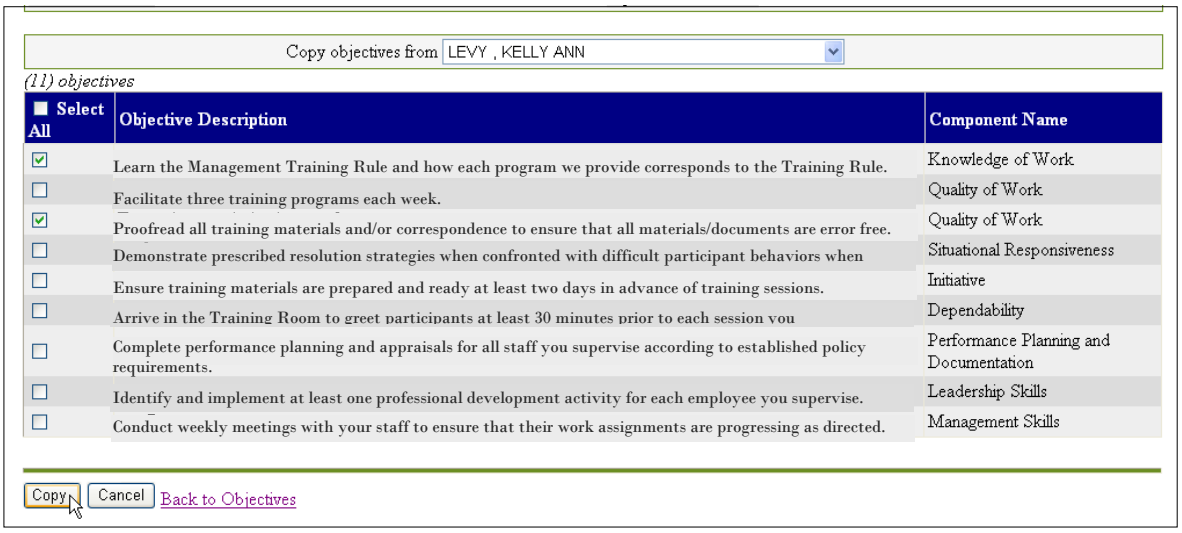

Clicking on the employee's name will bring up a page for the Rater to indicate the type of appraisal they are developing performance objectives for (Annual, Probationary, Special). The Rater will select the type of appraisal and click the 'Show Performance Objectives' button.

This displays any objectives that the employee may already have for that appraisal type.

The rater clicks the 'Copy Objectives' button and is taken to a page where they can select an employee and appraisal type to copy from:



After selecting an employee and type, a list of objectives is displayed. The Rater then individually selects objectives by clicking in the check box next to the applicable objectives or clicks in the check box next to words “Select All,” and then clicks the ‘Copy’ button.




The following message appears and the user can either select additional objectives to copy or go back to objectives.

# Printing the Paper Copy of the Performance Plan

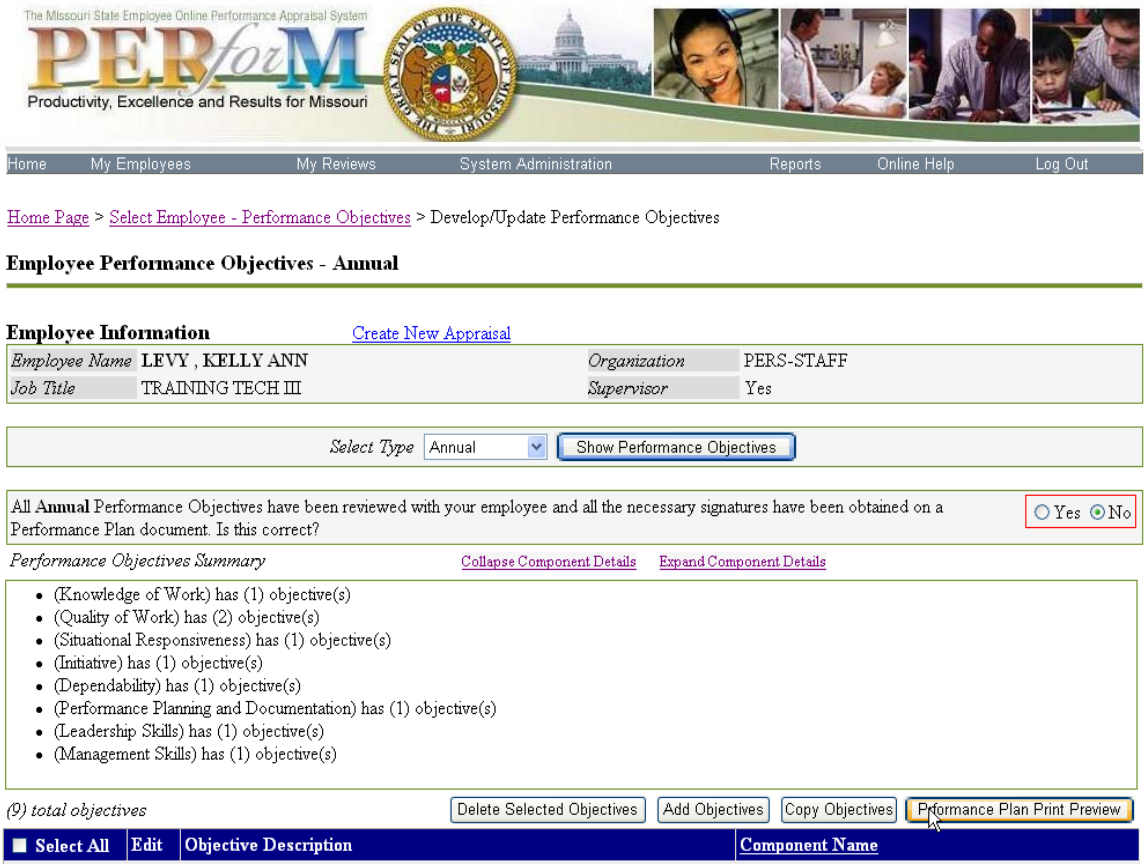
These are the steps to print a Performance Plan for the employee to review and sign.

1. Select the employee name.

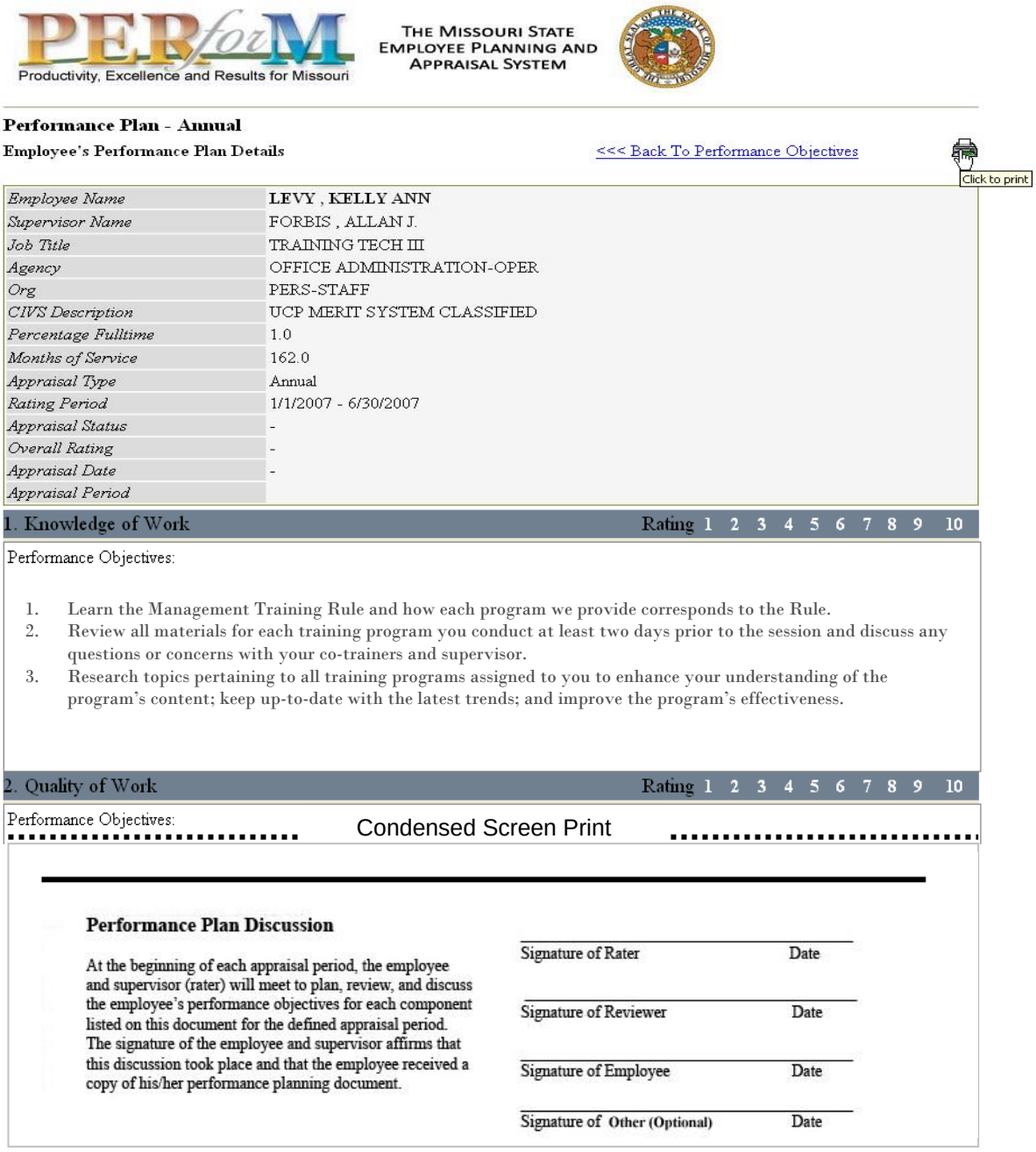
2. Select the appraisal type from the drop-down menu.

Click the 'Show Performance Objectives' button to display the employee's objectives.

3. Click the 'Performance Plan Print Preview' button.



4. Once selected, the printer-friendly version of the document is displayed



PERforM
Productivity, Excellence and Results for Missouri

THE MISSOURI STATE EMPLOYEE PLANNING AND APPRAISAL SYSTEM

**Performance Plan - Annual**

**Employee's Performance Plan Details**

<<< Back To Performance Objectives

Click to print

| | |
|---|---|
| *Employee Name* | LEVY , KELLY ANN |
| *Supervisor Name* | FORBIS , ALLAN J. |
| *Job Title* | TRAINING TECH III |
| *Agency* | OFFICE ADMINISTRATION-OPER |
| *Org* | PERS-STAFF |
| *CIVS Description* | UCP MERIT SYSTEM CLASSIFIED |
| *Percentage Fulltime* | 1.0 |
| *Months of Service* | 162.0 |
| *Appraisal Type* | Annual |
| *Rating Period* | 1/1/2007 - 6/30/2007 |
| *Appraisal Status* | - |
| *Overall Rating* | - |
| *Appraisal Date* | - |
| *Appraisal Period* | |

**1. Knowledge of Work** Rating 1 2 3 4 5 6 7 8 9 10

Performance Objectives:

1. Learn the Management Training Rule and how each program we provide corresponds to the Rule.
2. Review all materials for each training program you conduct at least two days prior to the session and discuss any questions or concerns with your co-trainers and supervisor.
3. Research topics pertaining to all training programs assigned to you to enhance your understanding of the program's content; keep up-to-date with the latest trends; and improve the program's effectiveness.

**2. Quality of Work** Rating 1 2 3 4 5 6 7 8 9 10

Performance Objectives:

Condensed Screen Print

**Performance Plan Discussion**

At the beginning of each appraisal period, the employee and supervisor (rater) will meet to plan, review, and discuss the employee's performance objectives for each component listed on this document for the defined appraisal period. The signature of the employee and supervisor affirms that this discussion took place and that the employee received a copy of his/her performance planning document.

Signature of Rater Date

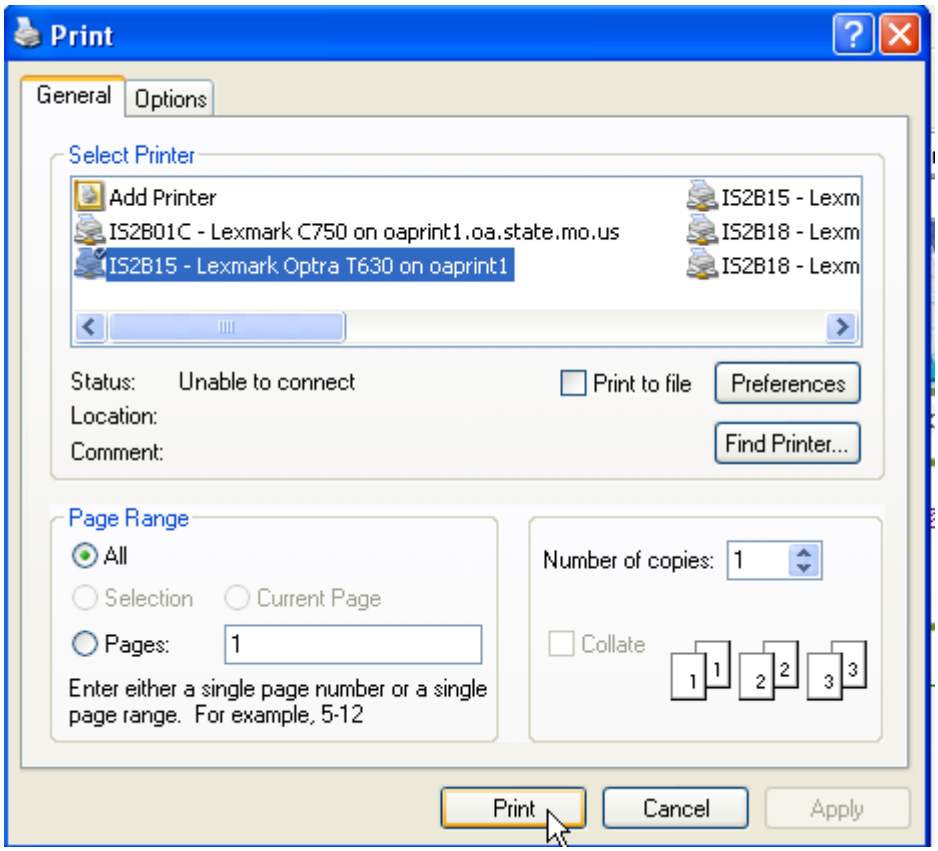
Signature of Reviewer Date

Signature of Employee Date

Signature of Other (Optional) Date

5. Click the "Printer" icon that appears near the top right corner of the document, next to the "<<<Back To Performance Objectives" link.

6. A printer dialog box will appear and the user clicks the “Print” button to send it to the desired printer.

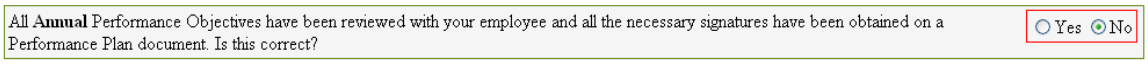


# Indicating Performance Objectives have been Communicated to the Employee

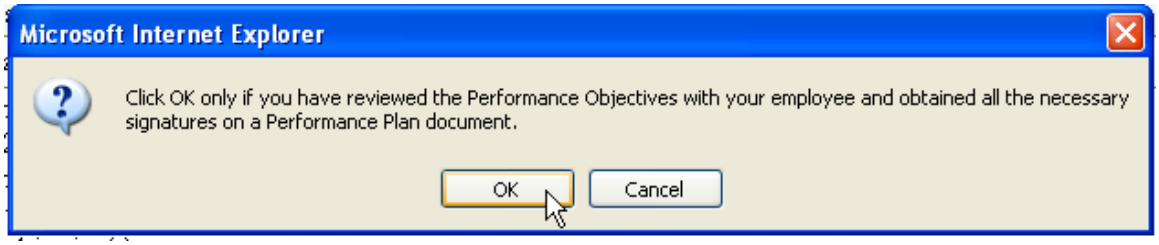
Once the Rater is finished entering all performance objectives for each of the employee's performance components, the Rater will print the Performance Plan for the employee and obtain all the necessary signatures.

However, the objectives (Performance Plans) are not finalized until the Rater has indicated in the PERforM system that the Performance Plan has been reviewed with the Employee.

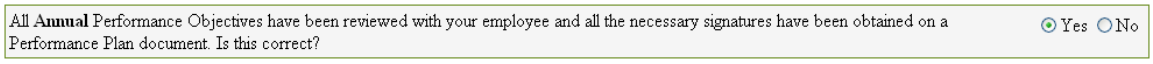
The Objectives reviewed box on the Develop/Update Performance Objectives page is outlined in red until the radio button is switched to 'Yes' by the Rater, indicating the objectives have been reviewed with the employee.




Before the 'Yes' button is enabled, the Rater is always reminded that the Performance Plan must be reviewed with the employee and must contain the necessary signatures.




If this process has occurred, the Rater selects 'OK' and the red outline around the radio buttons will disappear.




**Is the *Appraisal* (rating) document created after this step has been completed?**

No. The Rater has only created a set of objectives which an appraisal will be based upon. Selecting the 'Yes' button does not initiate an appraisal. During the rating period, the Rater will use the Performance Appraisal (Ratings and Annual Rating Exemptions) functionality on his or her Home Page in PERforM to create an appraisal for each employee.

**NOTE:** When the Rater modifies the employee's Performance Plan (objectives) or after an appraisal has been created which is populated with the existing objectives, the radio button will automatically switch from 'Yes' to 'No' and the red outline will reappear. This will indicate the Rater must repeat the review process. This includes the printing of a new Performance Plan document, reviewing the objectives with the employee and obtaining the necessary signatures on the Performance Plan document.

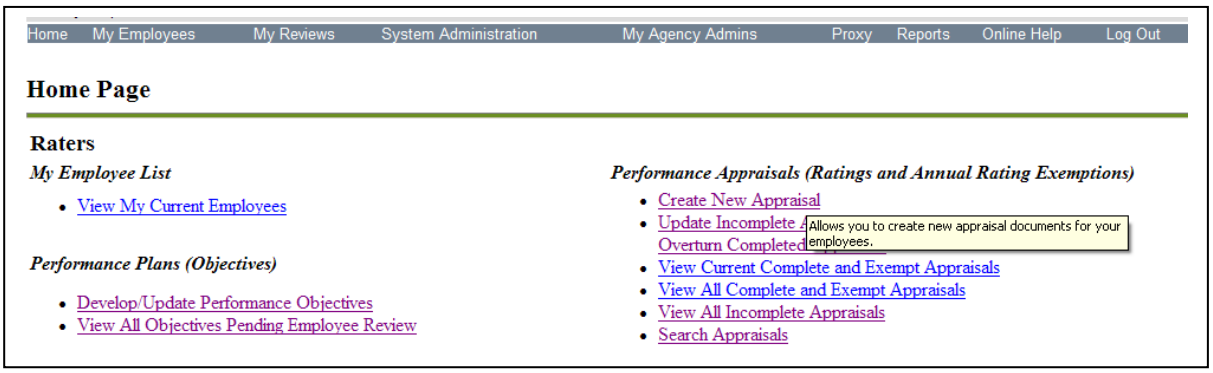
# PERforM Status Definitions

The status of an appraisal is automatically assigned by the PERforM system based upon the actions of the Rater and Reviewer. Status assignments and how they are used are listed below.

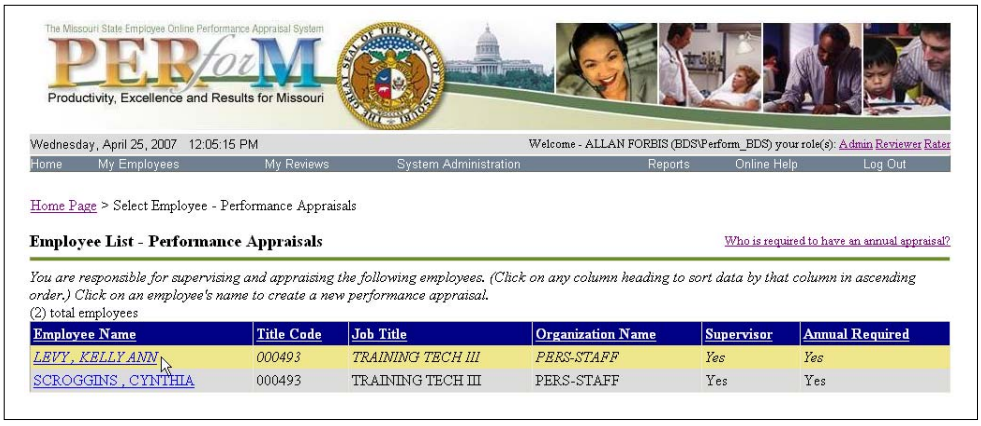
| Status | Meaning | Required Action |
|---|---|---|
| **Missing** | For reporting purposes, this is a required annual appraisal that has not been created (saved). | Rater creates the annual appraisal, includes appropriate ratings and/or comments, and submits it to the Reviewer. |
| **In Progress** | A performance appraisal has been created and saved. | Rater includes appropriate ratings and/or comments on the appraisal and submits it to the Reviewer. |
| **Pending** | A rated performance appraisal has been submitted to the Reviewer for action. | Reviewer approves or disapproves the appraisal, or provides recommendations to the Rater through use of an electronic sticky note. |
| **Approved** | The Reviewer agrees with the rated performance appraisal submitted by the Rater. | The Rater prints the appraisal, obtains necessary signatures, presents the document to the Employee, and then marks it as “Complete” in PERforM. |
| **Disapproved** | The Reviewer disagrees with some aspect of the performance appraisal submitted by the Rater. | The Rater and Reviewer should come to an agreement on what changes are needed to make the appraisal acceptable. The Rater incorporates those changes and resubmits the appraisal to the Reviewer for approval. |
| **Exempt Pending** | A required annual appraisal containing an explanation for exemption (in the Overall Comments) has been submitted to the Reviewer for action. | Reviewer approves or disapproves the exempted appraisal, or provides comments to the Rater through use of an electronic sticky note. |
| **Exempt** | A required annual appraisal containing an exemption has been approved by the Reviewer, and is considered finalized in PERforM. | The Rater prints the appraisal, obtains necessary signatures, and presents the document to the Employee. The Rater then makes copies of the appraisal and disseminates according to agency policy. |
| **Complete** | An appraisal has been reviewed with the Employee and the Rater has used the “Complete” button in PERforM to indicate that it is finalized. | The Rater makes copies of the appraisal and disseminates according to agency policy. |

# Creating Annual Appraisals (Ratings or Rating Exemptions)

From the Rater's Home Page in PERforM, he or she will click the Create New Appraisal link.




This will take the Rater to a page listing the employees he or she supervises. The Rater will select the employee for whom an appraisal is to be created by clicking on the employee's name.




The Rater will be taken to the Select Appraisal Type page to select the type of appraisal they want to create for the employee. The Rater will select Annual from the drop down box and click "OK."

This action will take the Rater to the Create Performance Appraisal page.

Using the available buttons, the Rater can:

1 Assign “In Progress” status to the new appraisal and retain work.

2 Rate each performance component.

3 Enter comments about the employee’s performance for each performance component.

4 Enter overall comments about the employee’s performance during the appraisal period or provide an explanation for exemption if insufficient information exists to rate the employee.

5 Calculate the employee’s overall score and performance rating.

6 Submit the Appraisal to the Reviewer for approval and change the status to “Pending.”

7 Exempt the employee from the Annual Appraisal rating (in accordance with agency policy).

8 Attach a document to the Appraisal.

9 Print the Appraisal.

## Entering Written Comments on the Employee's Appraisal

Written comments regarding the employee's performance during the appraisal period may be entered on the Create Performance Appraisal page (or the Edit/Update Performance Appraisal page if the appraisal has already been created and saved), in the 'Comments' field for each performance component and the 'Overall Comments' field near the bottom of the page. To include comments, the Rater places his or her cursor in the appropriate text field and types their comments. The text is saved in PERforM each time the Rater saves the appraisal. The Rater can change the text in the fields as many times as desired. The amount of characters (letters and spaces combined) permitted in each field is listed below:

**Comments for Components** – 500 Characters
**Overall Comments** – 1000 Characters

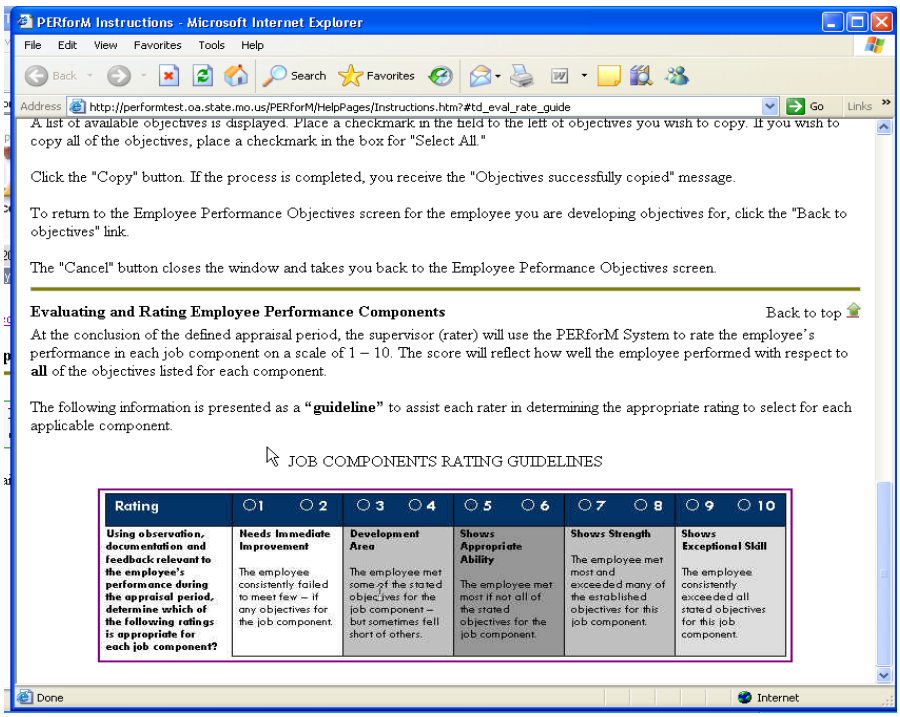
In instances when an employee is given an exemption from receiving an annual rating, the Rater provides a justification for this action in the Overall Comments field.

**Note:** Written comments can be added, modified and deleted until the time the appraisal has been approved; however, the appraisal must be resubmitted to the Reviewer.

## Scoring (Rating) Performance Components

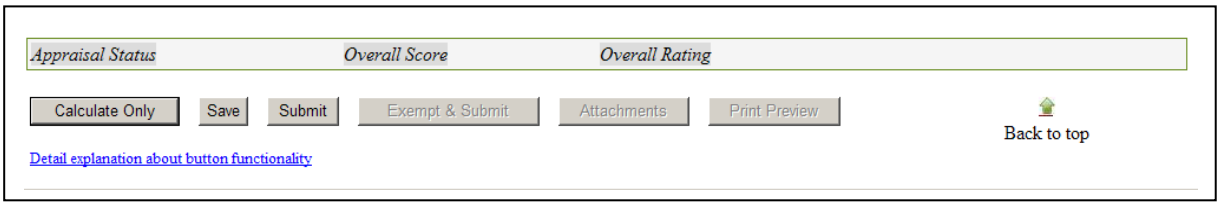
On the Create Performance Appraisal page (or the Edit/Update Performance Appraisal page if the appraisal has already been created and saved), the Rater can indicate a score for each component by clicking next to the score they desire.

To review guidelines about scoring Performance Components, Raters can click the "How to Evaluate and Rate Employee Performance Components" link near the top of the page.



## Calculating the Results of Performance Component Scores

At the bottom of the Create Performance Appraisal page, there is a “Calculate” button to compute the employee’s overall score and populate the ‘Overall Rating’ field. The score and overall rating is displayed at the bottom of the appraisal.

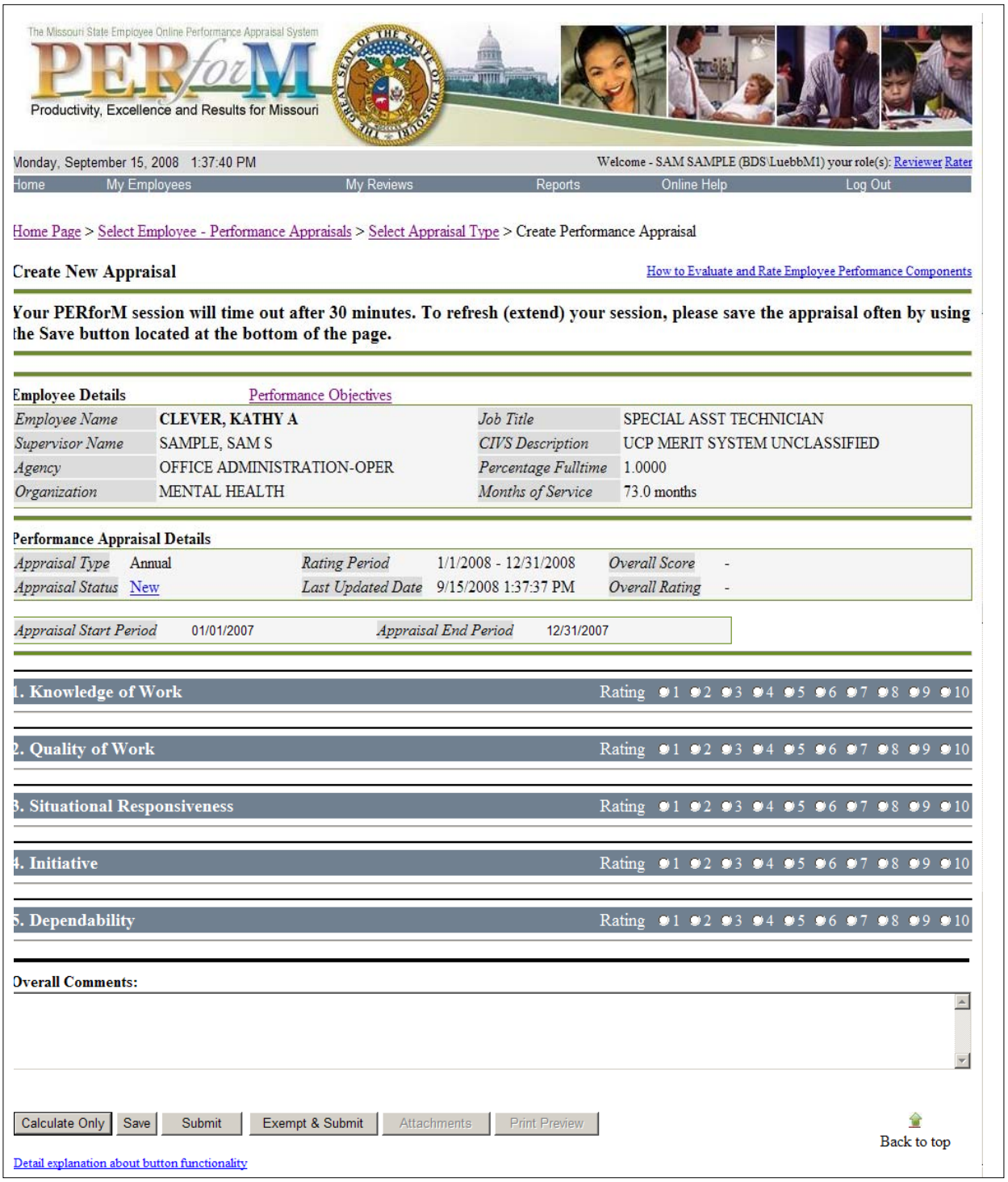



## Enabling “Quick Scoring”

If the Rater elects to do so, he or she can enable Quick Scoring of the appraisal by clicking the “Enable Quick Scoring” box and the “OK” button on the Select Appraisal Type page.

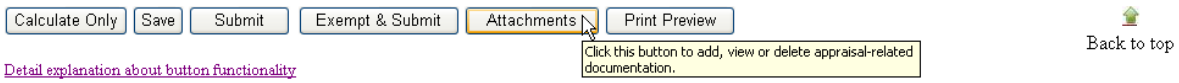
This action will condense the appraisal so that only the rating or scoring feature of each Performance Component is displayed. The performance objectives and comments field for each component will not be visible.

The following screen print shows what the open appraisal will look like with Quick Scoring on:

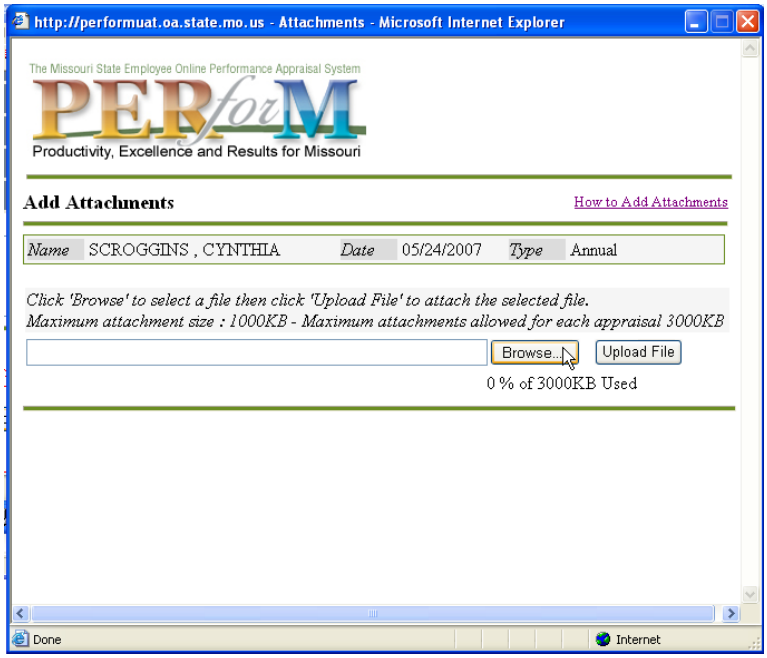


## Using PERforM's Attachment Feature

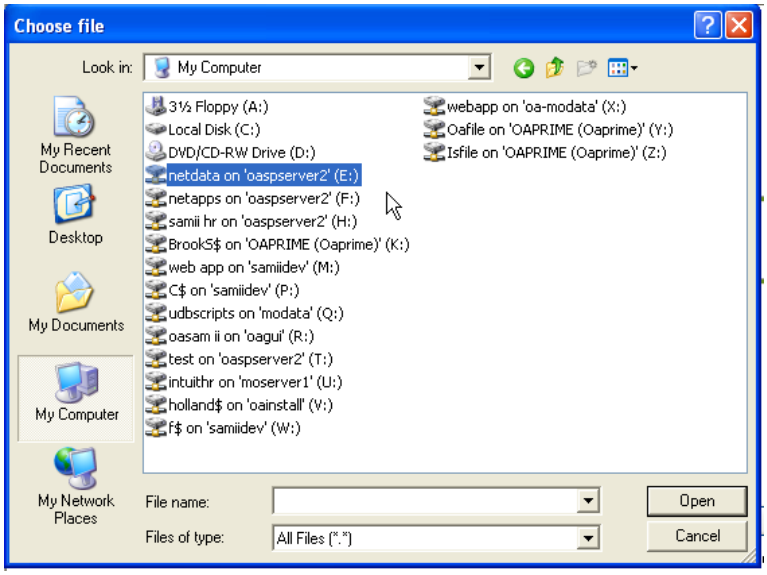
The Rater can attach a document to the appraisal in PERforM once the appraisal has been saved for the first time. To include an attachment, the rater clicks the "Attachment" button on the bottom of the Create Performance Appraisal page.



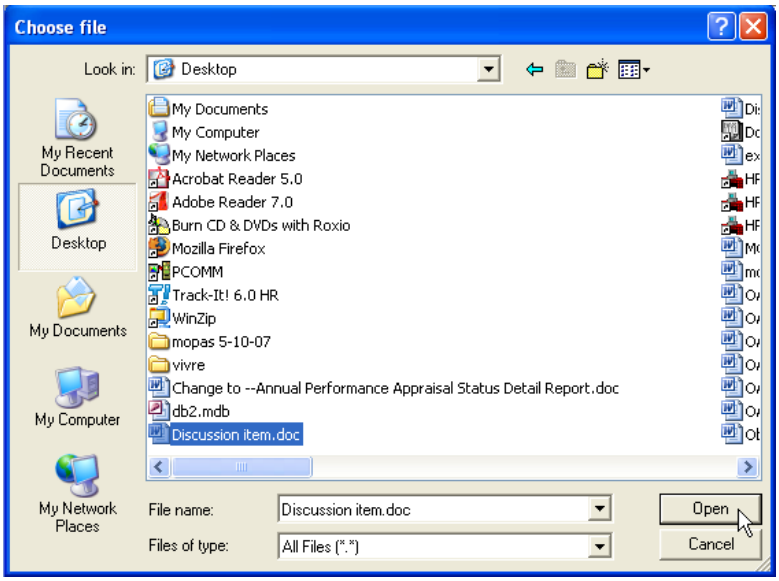

A new page will pop up prompting the Rater to select a document to attach.



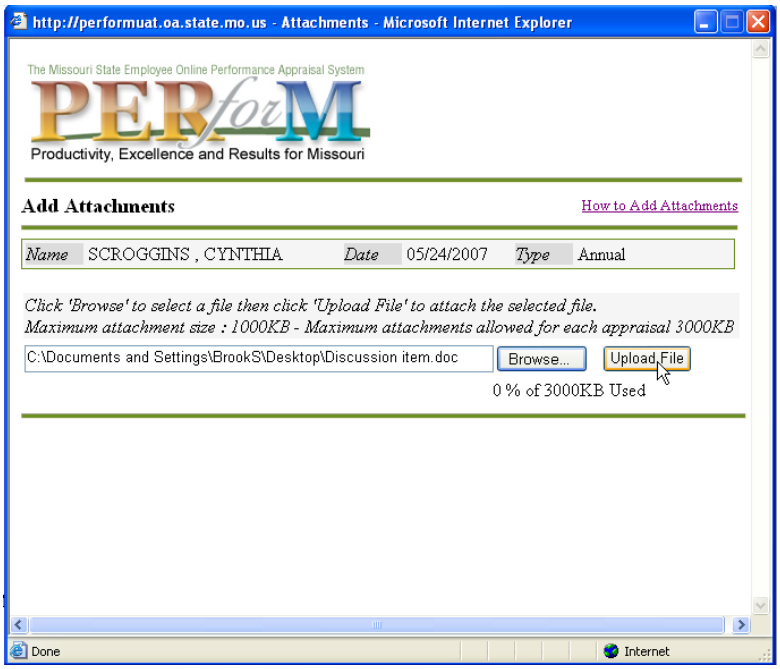

When the Rater clicks the browse button, he or she can select items from their own pc or the network to attach.



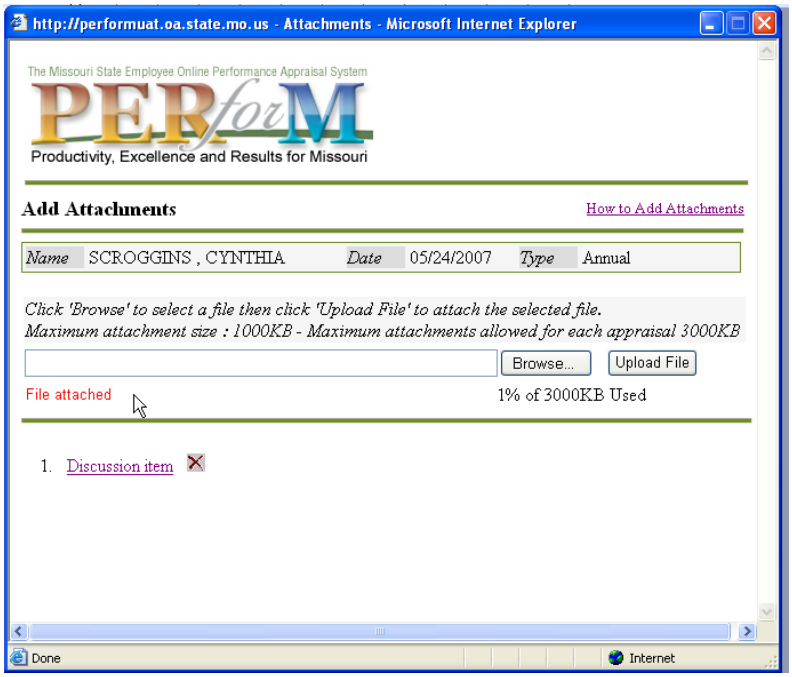
Once the Rater locates and selects the correct file to attach, he or she will click the “Open” button.




The file will then be selected in the browse drop-down and the Rater will click the upload file button to complete the process.

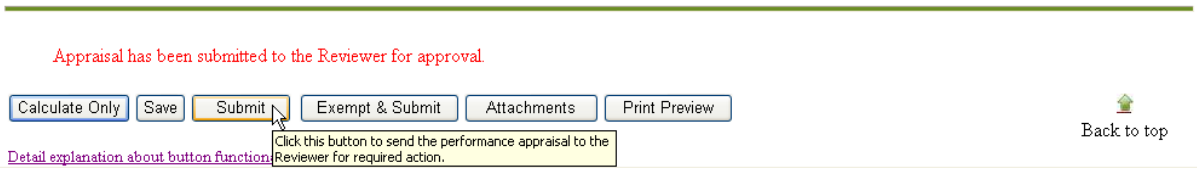


A message will be displayed that the file has been attached.



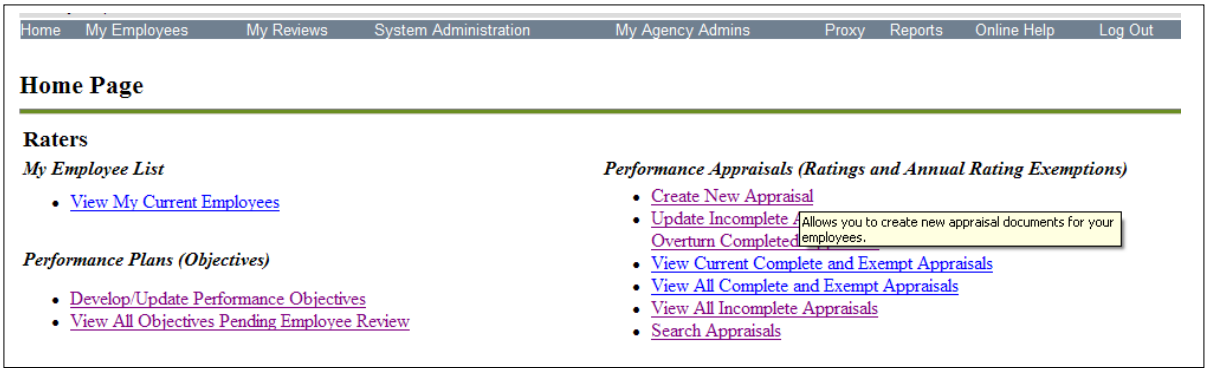

## Routing the Appraisal to the Reviewer for Approval

All appraisals (ratings and rating exemptions) are “routed” to the Reviewer by clicking the “Submit” button or “Exempt & Submit” button on the bottom of the Create Performance Appraisal or the Edit/Update Performance Appraisal page. A message confirming the action was successful will be displayed and the appraisal status will change to either “Pending” or “Exempt Pending.”

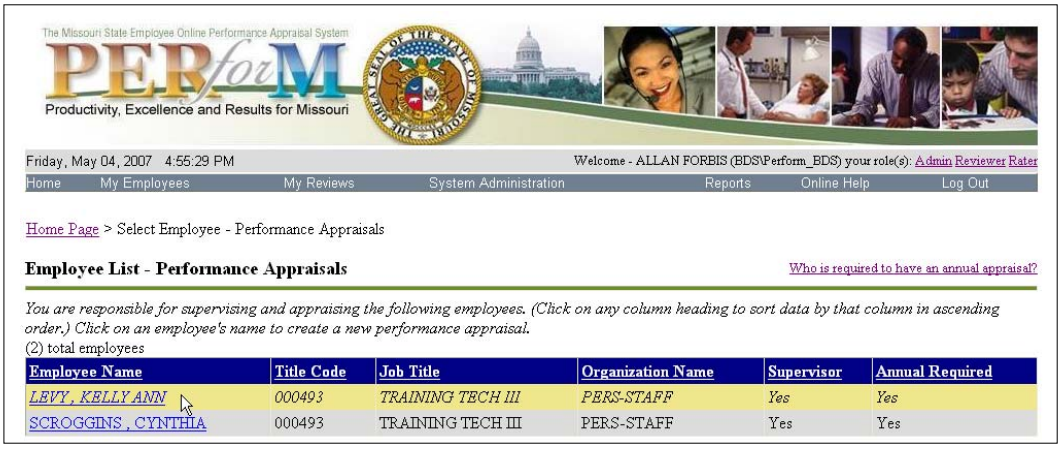


# Creating Special and Probationary Appraisals

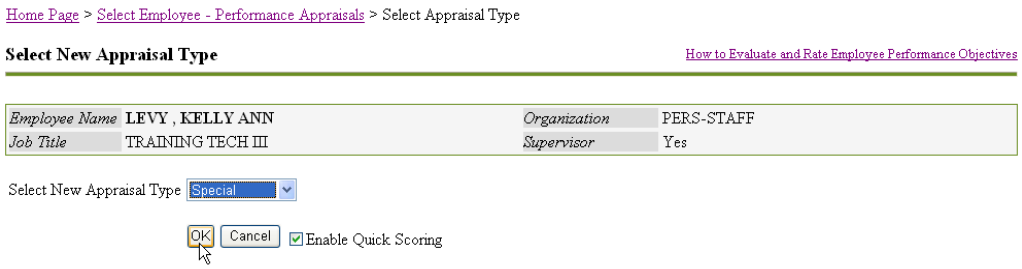
The process to create **Special** and **Probationary Appraisals** is almost identical to the process used to create Annual Appraisals. To create either a Special or Probationary Appraisal, the Rater will click the Create New Appraisal link from their Home Page:




This will take the Rater to a page listing the employees he or she supervises. The Rater will select the employee for whom the appraisal is to be created by clicking the employee's name.

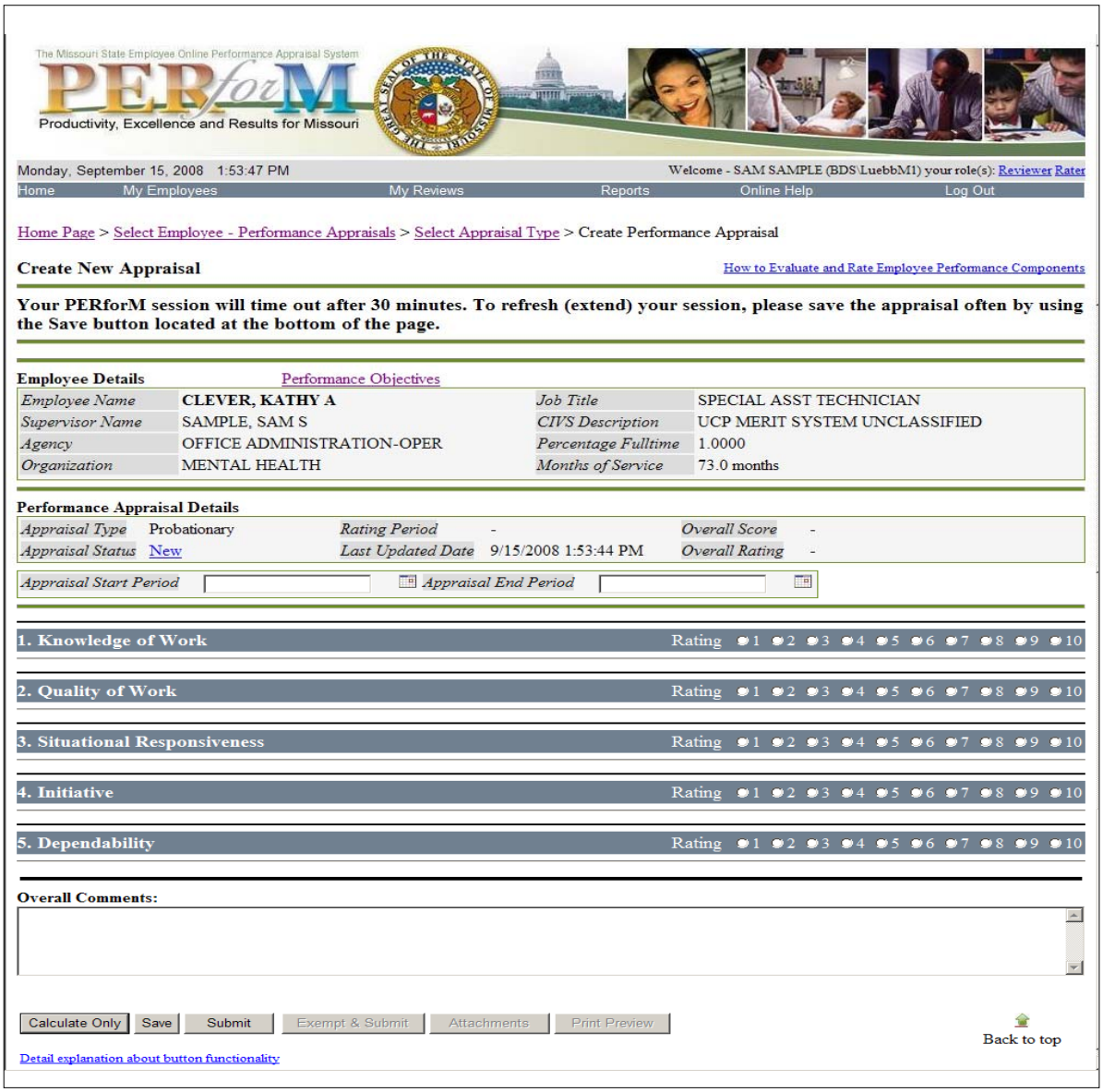



The Rater will be taken to the Select Appraisal Type page to select the type of appraisal (Special or Probationary) they want to create for the employee. The Rater will select the appraisal type from the drop down box and click "OK."

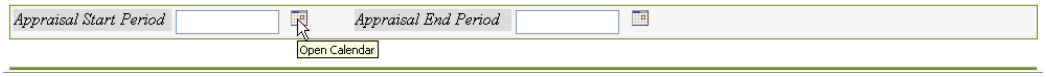


The Create Performance Appraisal page will open. The example below shows the Appraisal in “Quick Scoring” mode.

**NOTE:** If performance objectives were not previously created for the appraisal type (Special or Probationary), the Rater will not be able to proceed with the appraisal until this step has been completed. In other words, a specific “set” of objectives must already exist for Special or Probationary Appraisals. If the Rater initially created performance objectives which apply to the employee’s Annual appraisal, a new – or duplicate set of objectives – must also be created for other types of appraisals.

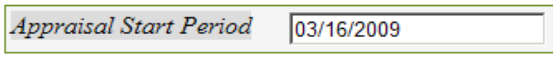


The significant difference between creating an Annual Appraisal and creating a Special or Probationary Appraisal is the need to enter the Appraisal's Start Period and the Appraisal's End Period. To select an appraisal start date, the Rater will click on the calendar next to the text box:

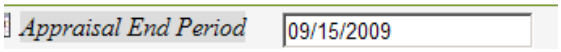



A calendar will pop up for the Rater to select a start date for the Appraisal. The Rater will click on the desired date to indicate the start date:

The selected date will appear in the text box.




The Rater can also type a date in the box instead of using the pop up calendar. For example, the Rater could type the end date for the Appraisal directly in the box instead of using the calendar.



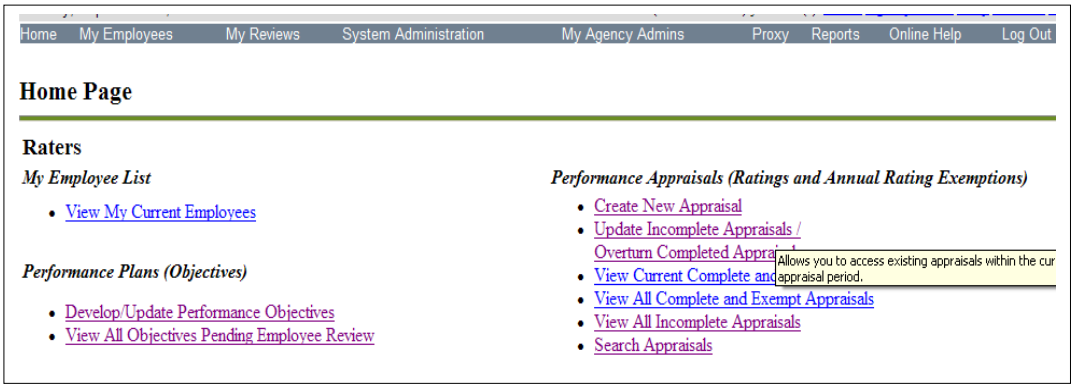

## Completing the Appraisal

After these initial steps have been completed, the Rater will fill out the appraisal with necessary rating and comment information and then submit it for approval in the same manner Annual Appraisals are processed.

For more detailed information concerning processing steps involved in creating an appraisal, please refer to the Creating Annual Appraisals link.

# Completing the Appraisal Process

After the Reviewer has taken action on an appraisal, the Rater can confirm the review has occurred by clicking the "Update Incomplete Appraisals" link on the Rater's Home Page.

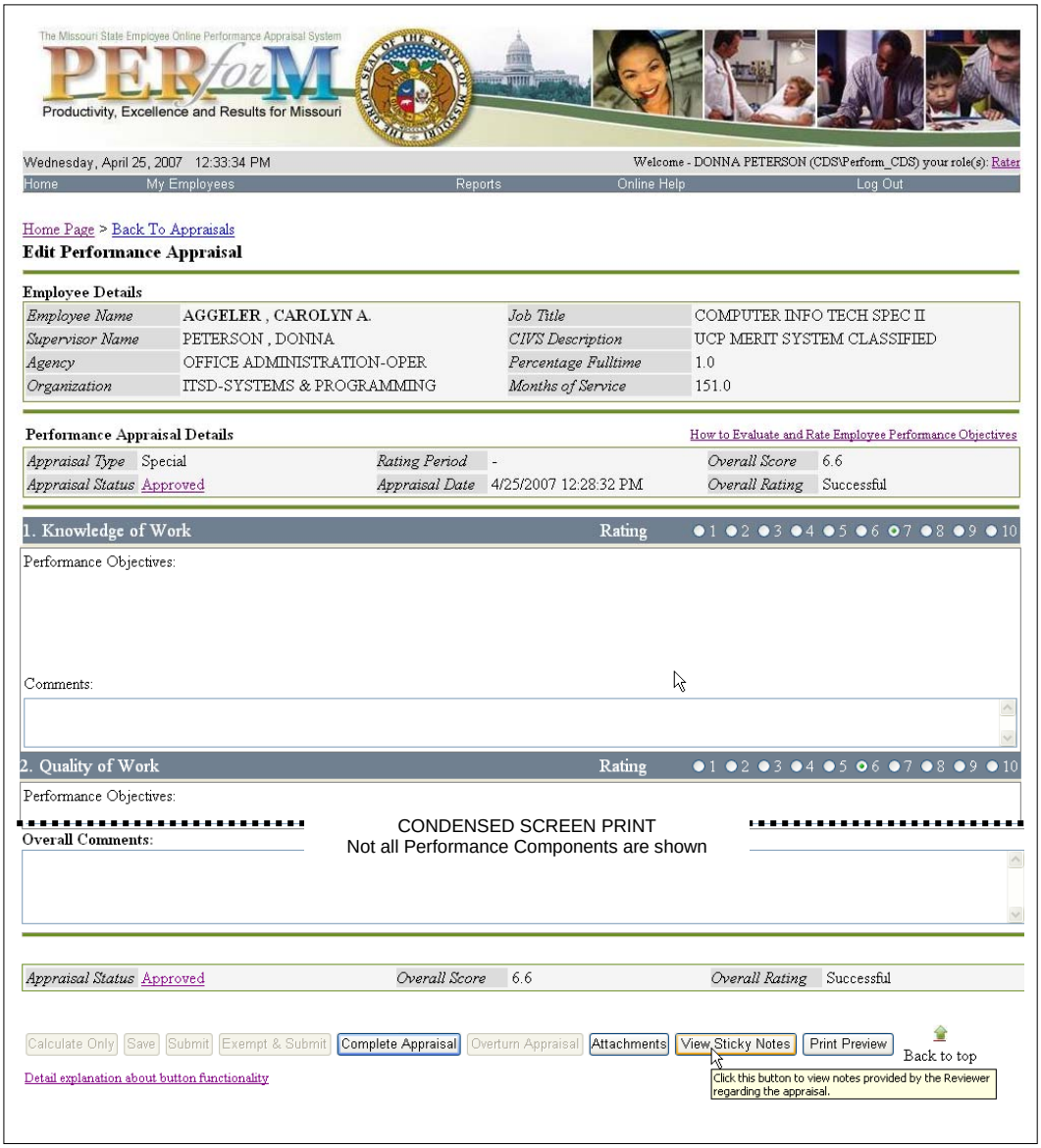



Selecting this link will bring up the Select Performance Appraisal page which provides a list of appraisals the Rater has started. The "paperclip" icon identifies the appraisals containing attachments added by the Rater. The **"NEW"** indicator tells the Rater that the Reviewer has provided a "sticky note" containing comments or recommendations for an appraisal.
The Appraisal Status will indicate whether the Reviewer has Approved or Disapproved a submitted appraisal.

The "Edit" link is used by the Rater to open an appraisal.

| Edit | | | Employee Name | Job Title | Organization | Supervisor | Type | Appraisal Status | Date Modified |
|---|---|---|---|---|---|---|---|---|---|
| Edit | | NEW | AGGELER , CAROLYN A. | COMPUTER INFO TECH SPEC II | ITSD-SYSTEMS & PROGRAMMING | PETERSON , DONNA | Special | Approved | 04/25/2007 |
| Edit | | | BERHORST , JOHN F. | COMPUTER INFO TECHNOLOGIST III | ITSD-SYSTEMS & PROGRAMMING | PETERSON , DONNA | Annual | In Progress | 04/19/2007 |
| Edit | | NEW | FIFE , BRENDA K | COMPUTER INFO TECHNOLOGIST III | ITSD-SYSTEMS & PROGRAMMING | PETERSON , DONNA | Annual | Disapproved | 04/19/2007 |
| Edit | | | REINSTEIN , BERT | COMPUTER INFO TECH SPEC I | ITSD-SYSTEMS & PROGRAMMING | PETERSON , DONNA | Annual | In Progress | 04/20/2007 |

The Edit Performance Appraisal page for the selected appraisal will open.

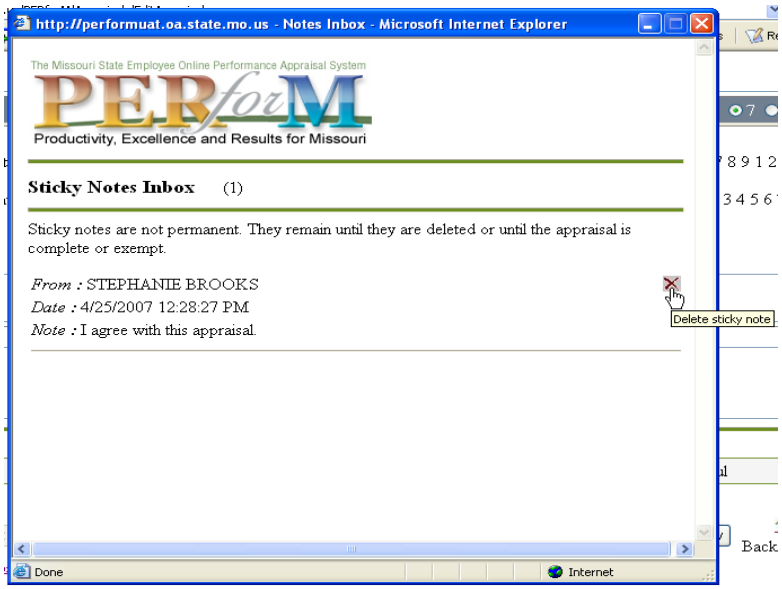



From the Edit Performance Appraisal page, the rater will be able to view “sticky notes.” While the appraisal is in “Disapproved” or “Pending” status, the Rater can add/remove attachments, adjust ratings, and edit comments as necessary based on the Reviewer’s recommendations. Once this has occurred, the Rater will again submit the appraisal to the Reviewer for approval.

If the appraisal is “Approved,” the rater can print the appraisal and use the “Complete Appraisal” button to finalize the appraisal process.

## Viewing "Sticky Notes"

The "View Sticky Notes" button brings up the note the Reviewer sent. The Rater can either delete the note by clicking the "**X**" icon or keep the note by closing the pop up. At the conclusion of the appraisal process, any remaining sticky notes will be purged from PER*for*M and will not be retained as part of the appraisal.




## Attachments

The "Attachments" button displays the following page. The rater can add an attachment by using the "Browse" button, selecting the appropriate file, and then using the "Upload File" button. To remove an attachment from an appraisal, the Rater clicks on the "**X**" icon that appears to the right of the listed file name.

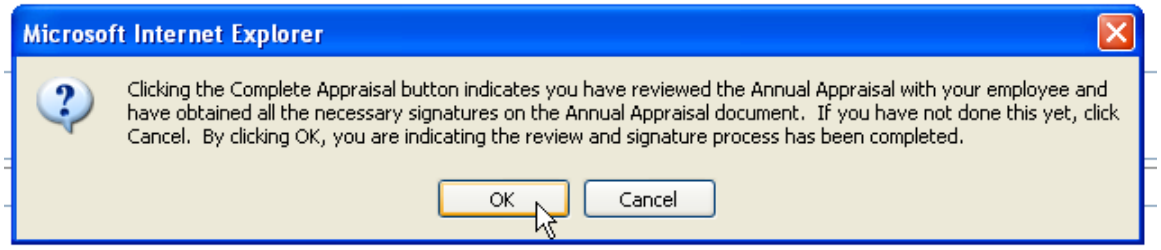
## Printing the Appraisal

The Rater can click the “Print Preview” button to print a paper copy of the appraisal.

## Indicating the Appraisal has been Reviewed with the Employee

To indicate that the employee has received the appraisal and that the appraisal has been signed by the Rater, Reviewer and employee, the Rater will click the “Complete Appraisal” button near the bottom of the page.

A confirmation message will be displayed as a reminder that this should occur *before* the appraisal is marked as “Complete” in the system.



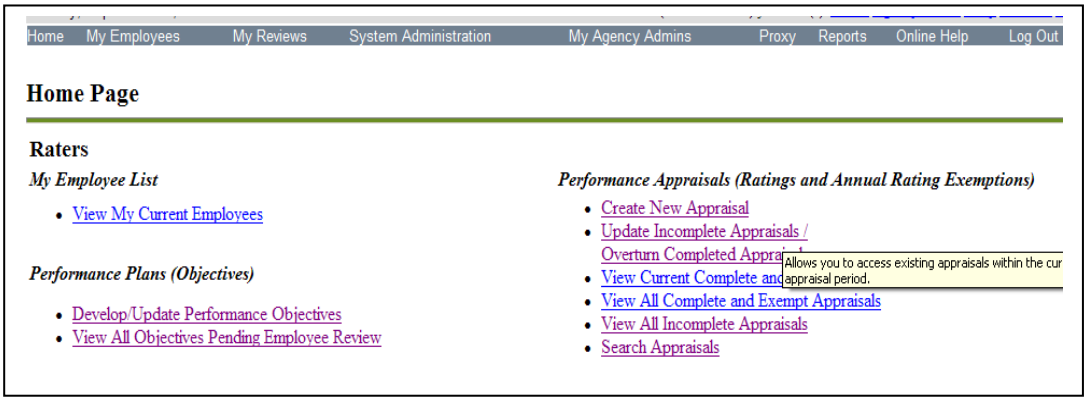

The appraisal cannot be changed after it has been approved by the Reviewer unless it is marked as “Complete” and then later overturned.

# Overturning An Appraisal

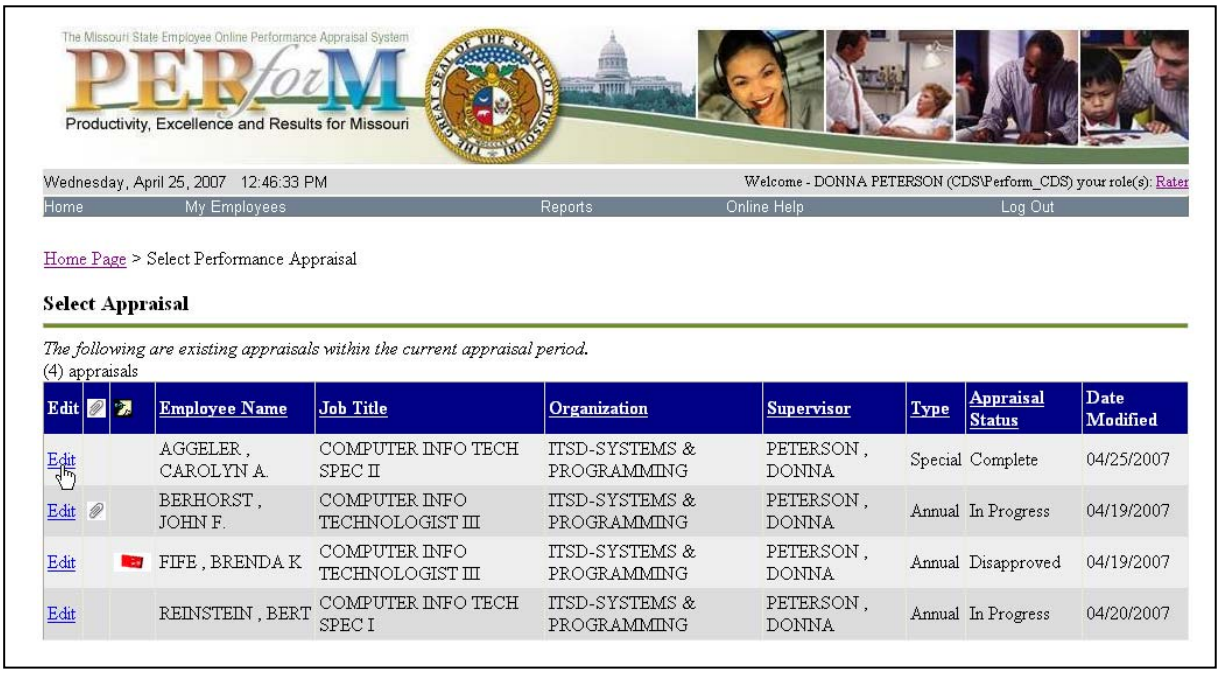
Once a decision has been made in accordance with agency policy to change a rating and/or comment on a completed appraisal, the appraisal is overturned in PER*for*M.

**Note:**
Annual appraisals can only be overturned during the rating period (January 1 – March 31).

To overturn an appraisal, the Rater clicks on the "Overturn Completed Appraisals" link on their Home Page.

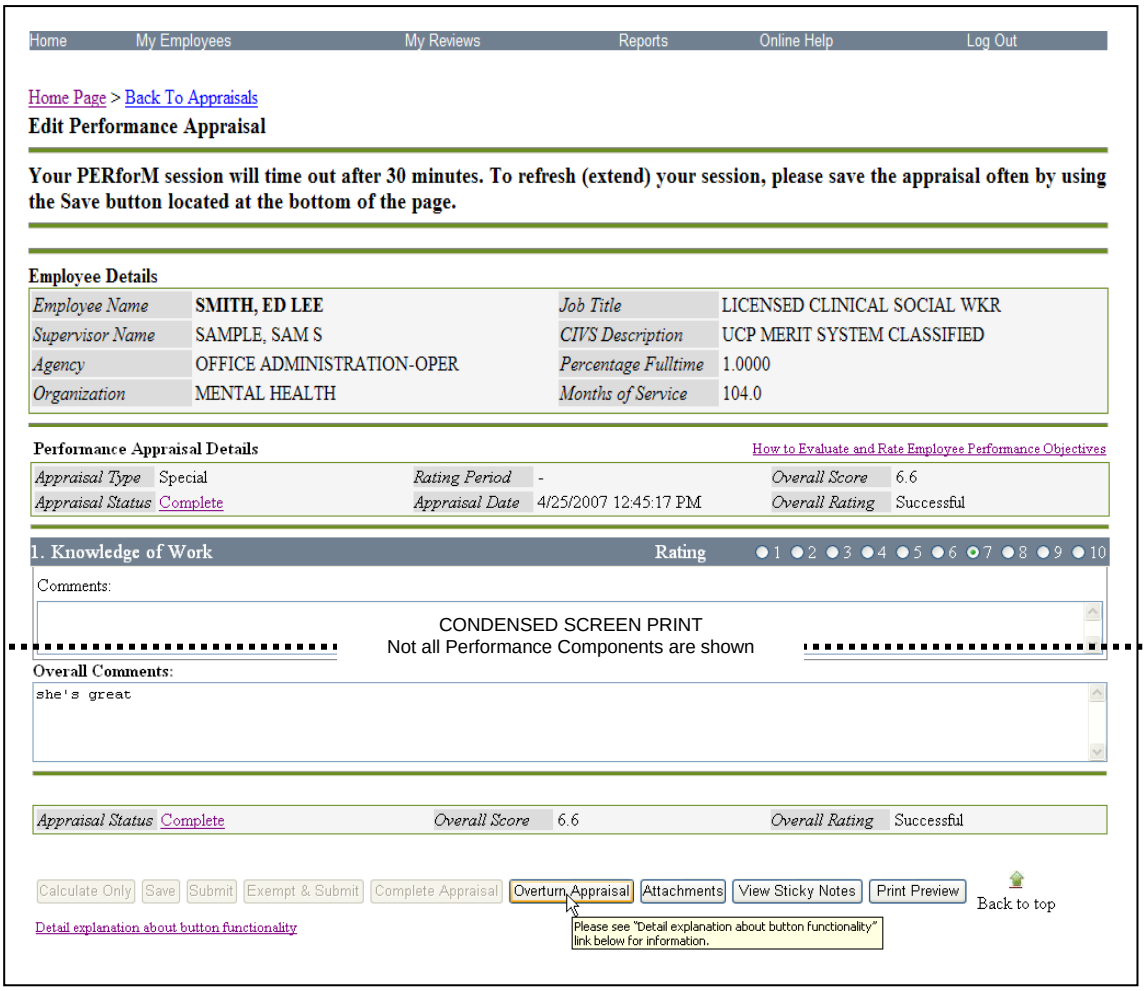



The Rater is taken to their list of appraisals. He or she will select the "Complete" appraisal to open from the list by clicking the "Edit" link.

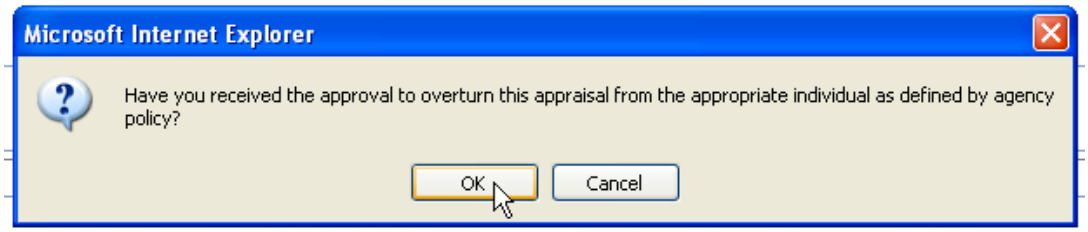



| Edit | | | Employee Name | Job Title | Organization | Supervisor | Type | Appraisal Status | Date Modified |
|---|---|---|---|---|---|---|---|---|---|
| Edit | | | AGGELER , CAROLYN A. | COMPUTER INFO TECH SPEC II | ITSD-SYSTEMS & PROGRAMMING | PETERSON , DONNA | Special | Complete | 04/25/2007 |
| Edit | | | BERHORST , JOHN F. | COMPUTER INFO TECHNOLOGIST III | ITSD-SYSTEMS & PROGRAMMING | PETERSON , DONNA | Annual | In Progress | 04/19/2007 |
| Edit | | | FIFE , BRENDA K | COMPUTER INFO TECHNOLOGIST III | ITSD-SYSTEMS & PROGRAMMING | PETERSON , DONNA | Annual | Disapproved | 04/19/2007 |
| Edit | | | REINSTEIN , BERT | COMPUTER INFO TECH SPEC I | ITSD-SYSTEMS & PROGRAMMING | PETERSON , DONNA | Annual | In Progress | 04/20/2007 |

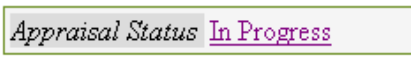
This opens the appraisal.




The Rater then clicks the “Overturn Appraisal” button at the bottom of the page. A confirmation message is displayed.




If the Rater clicks “Cancel”, the appraisal stays in “Complete” status and remains unchanged. If the Rater clicks “OK,” the appraisal status changes to “In Progress.” The Rater can then edit the appraisal and save it or submit it.

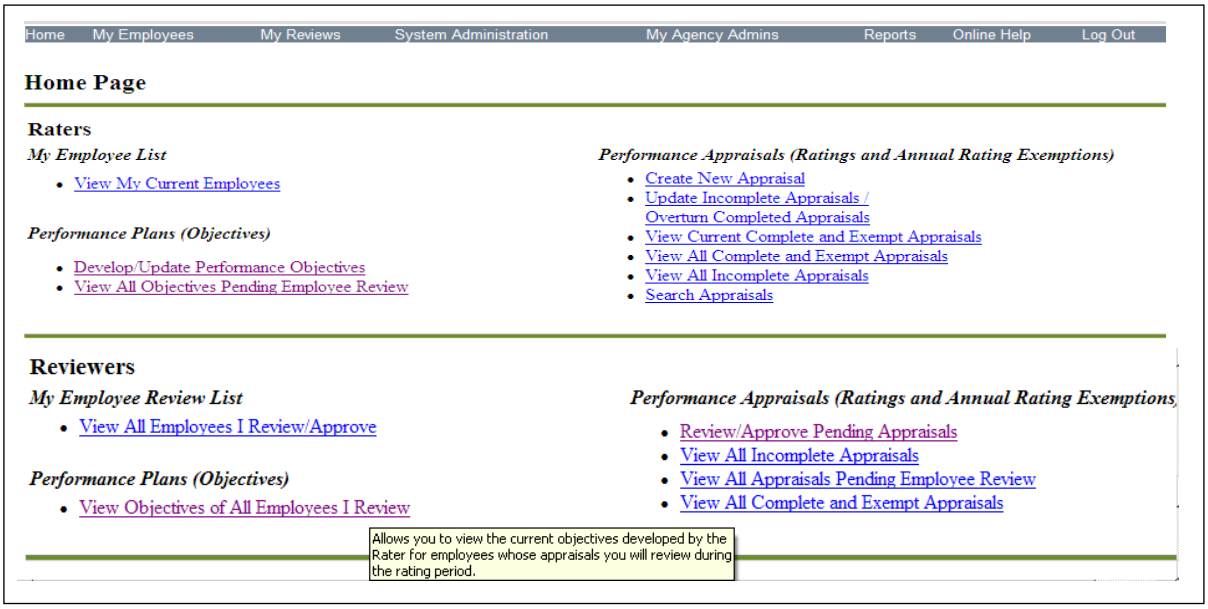



The appraisal must go back through the process of being approved by the Reviewer before it can be marked “Complete” and finalized in the system. For annual appraisals, this must be done before the rating period is over on March 31st.

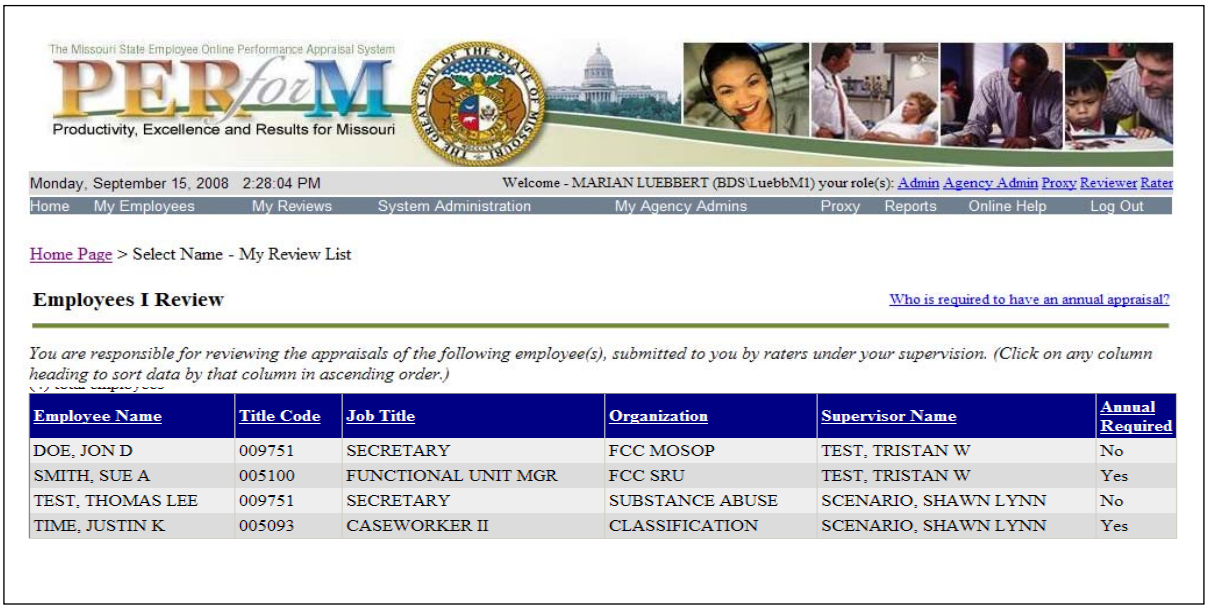
# Reviewers Using PER*for*M to View Objectives

Reviewers sign Performance Plans developed by Raters for staff under their responsibility to indicate approval of objectives. While Reviewers do not approve objectives in PER*for*M, they can view the objectives that have been developed.

To review objectives developed by the Rater, the Reviewer clicks the "View Objectives of All Employees I Review" link from the Reviewers section of their home page.

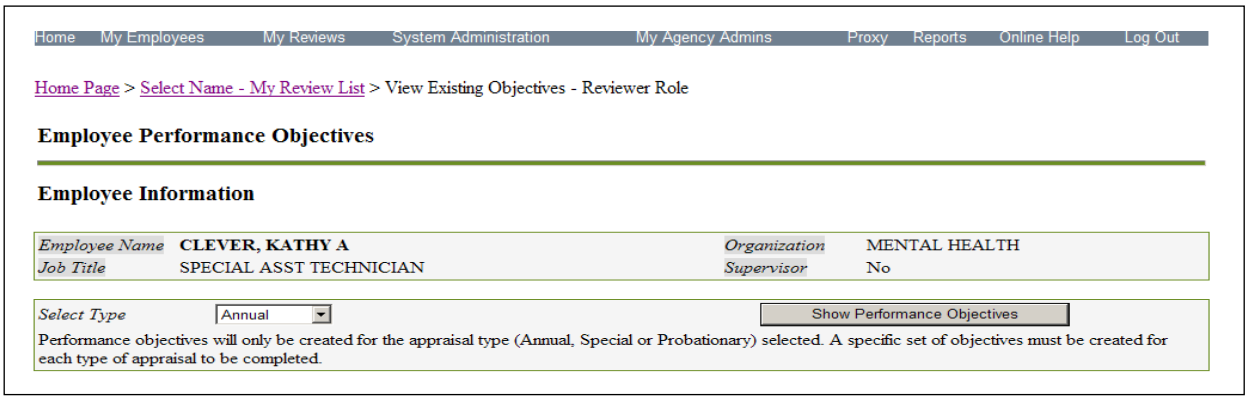



This opens the "Employees I Review" page where the Reviewer selects a name from the list.

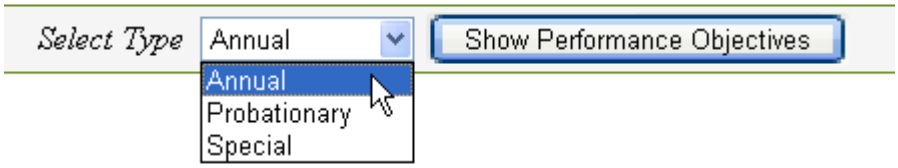



| Employee Name | Title Code | Job Title | Organization | Supervisor Name | Annual Required |
|---|---|---|---|---|---|
| DOE, JON D | 009751 | SECRETARY | FCC MOSOP | TEST, TRISTAN W | No |
| SMITH, SUE A | 005100 | FUNCTIONAL UNIT MGR | FCC SRU | TEST, TRISTAN W | Yes |
| TEST, THOMAS LEE | 009751 | SECRETARY | SUBSTANCE ABUSE | SCENARIO, SHAWN LYNN | No |
| TIME, JUSTIN K | 005093 | CASEWORKER II | CLASSIFICATION | SCENARIO, SHAWN LYNN | Yes |

Once the Reviewer clicks on the name, the “Performance Objectives for Employee I Review” page is displayed.



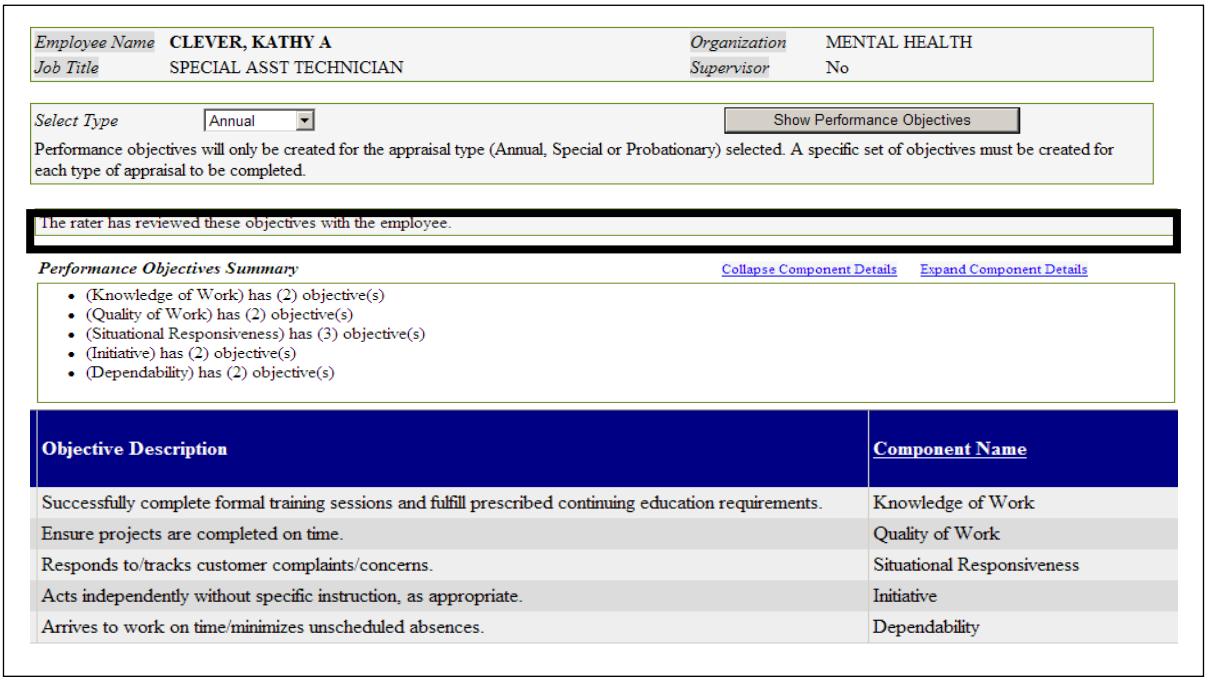

On this page, the Reviewer will select the type of objectives to review (Annual, Probationary or Special) and then click the “Show Performance Objectives” button.




Any existing objectives are then displayed. The Reviewer can view the selected employee’s objectives and, if desired, print them out by using the “Performance Plan Print Preview” button. However, no other actions (approval or disapproval) can be taken by the Reviewer. If needed, the Reviewer should communicate with the Rater about necessary revisions to the set of objectives.

Even though objectives exist, they may not have been communicated with the employee. The Reviewer must discern this by referring to the “reviewed” statement on the page.

This screen print indicates, “The rater **has** reviewed these objectives with the employee.”



*Employee Name* **CLEVER, KATHY A** *Organization* MENTAL HEALTH
*Job Title* SPECIAL ASST TECHNICIAN *Supervisor* No

*Select Type* Annual Show Performance Objectives

Performance objectives will only be created for the appraisal type (Annual, Special or Probationary) selected. A specific set of objectives must be created for each type of appraisal to be completed.

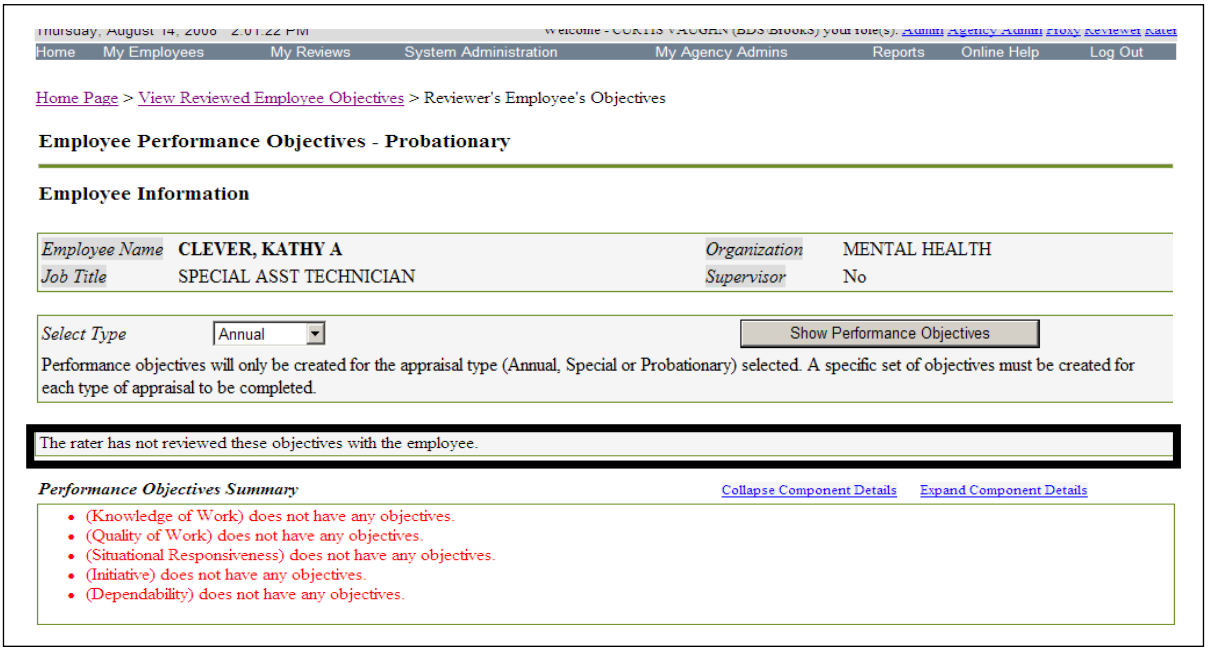
The rater has reviewed these objectives with the employee.

***Performance Objectives Summary*** Collapse Component Details Expand Component Details

- (Knowledge of Work) has (2) objective(s)
- (Quality of Work) has (2) objective(s)
- (Situational Responsiveness) has (3) objective(s)
- (Initiative) has (2) objective(s)
- (Dependability) has (2) objective(s)

| Objective Description | Component Name |
|---|---|
| Successfully complete formal training sessions and fulfill prescribed continuing education requirements. | Knowledge of Work |
| Ensure projects are completed on time. | Quality of Work |
| Responds to/tracks customer complaints/concerns. | Situational Responsiveness |
| Acts independently without specific instruction, as appropriate. | Initiative |
| Arrives to work on time/minimizes unscheduled absences. | Dependability |

This screen print indicates, “The rater **has not** reviewed these objectives with the employee.” In addition, no objectives currently exist for this appraisal type as noted in the *Performance Objectives Summary* portion of the page.



Home My Employees My Reviews System Administration My Agency Admins Reports Online Help Log Out

Home Page > View Reviewed Employee Objectives > Reviewer's Employee's Objectives

**Employee Performance Objectives - Probationary**

**Employee Information**

*Employee Name* **CLEVER, KATHY A** *Organization* MENTAL HEALTH
*Job Title* SPECIAL ASST TECHNICIAN *Supervisor* No

*Select Type* Annual Show Performance Objectives

Performance objectives will only be created for the appraisal type (Annual, Special or Probationary) selected. A specific set of objectives must be created for each type of appraisal to be completed.

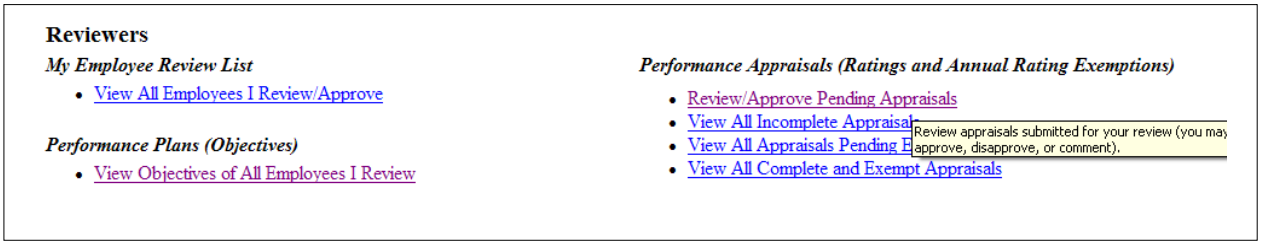
The rater has not reviewed these objectives with the employee.

***Performance Objectives Summary*** Collapse Component Details Expand Component Details

- (Knowledge of Work) does not have any objectives.
- (Quality of Work) does not have any objectives.
- (Situational Responsiveness) does not have any objectives.
- (Initiative) does not have any objectives.
- (Dependability) does not have any objectives.

# Using PERforM to Approve and Disapprove Appraisals

All appraisals must be approved by the Reviewer before being communicated to the employee. To review an appraisal submitted by the Rater, the Reviewer selects "Review/Approve Pending Appraisals" from the Reviewers section of their Home Page.




Clicking this link takes the Reviewer to the Select Performance Appraisal page to view the list of appraisals waiting for his or her review. The Reviewer clicks the word "Review" to open the appropriate appraisal from the list.

Once selected, the appraisal will open (see next page).

Using the buttons at the bottom of the “Pending” or “Exempt Pending” appraisal, the Reviewer has the option to approve or disapprove the appraisal, to view attachments, to add sticky notes, or to print the appraisal.

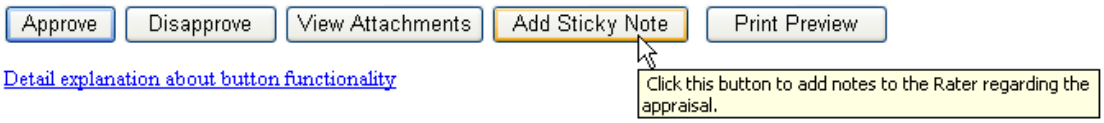
The Reviewer approves an appraisal by clicking the “Approve” button or disapproves an appraisal by clicking the “Disapprove” button. The appraisal’s status is automatically updated to “Approved,” “Exempt,” or “Disapproved” dependent on the action taken.

Raters can verify the status of appraisals they have submitted for review by clicking on the “Update Incomplete Appraisals” link from their Home Page (See Completing the Appraisal Process).

## Using "Sticky Notes" to Communicate to the Rater

In some instances, the Reviewer may not want to approve the appraisal as it has been submitted by the Rater and/or may want to send additional instruction or comments to the Rater regarding the appraisal. Electronic sticky notes can provide this communication.

The Reviewer can create sticky notes by clicking the "Add Sticky Note" button on the bottom of the appraisal page.




After clicking the "Add Sticky Note" button, a page opens which allows the Reviewer to type and send a *temporary* message to the Rater about the appraisal. To "attach" the sticky note to the appraisal and send it to the Rater to act upon, the Reviewer clicks the "Send" button.

Once the Rater has read the sticky note, the Rater can delete it. If the Rater does not delete the sticky note, it is automatically discarded when the appraisal attains "Complete" or "Exempt" status.