

# PERforM

## Training Environment

<http://performtrng.oa.state.mo.us/PERforM/>

*Updated October 14, 2008*



### Important Notes:

The training environment will be refreshed (reset) each morning between 4 – 5 am.

No data from any session will be kept.

The training environment will be available each weekday with the following exceptions:

- ▶ The first and third Friday of each month the system will be unavailable to allow time for maintenance of the training environment.
- ▶ The second Wednesday of each month, the system will be unavailable from 4 – 7 am for server maintenance.

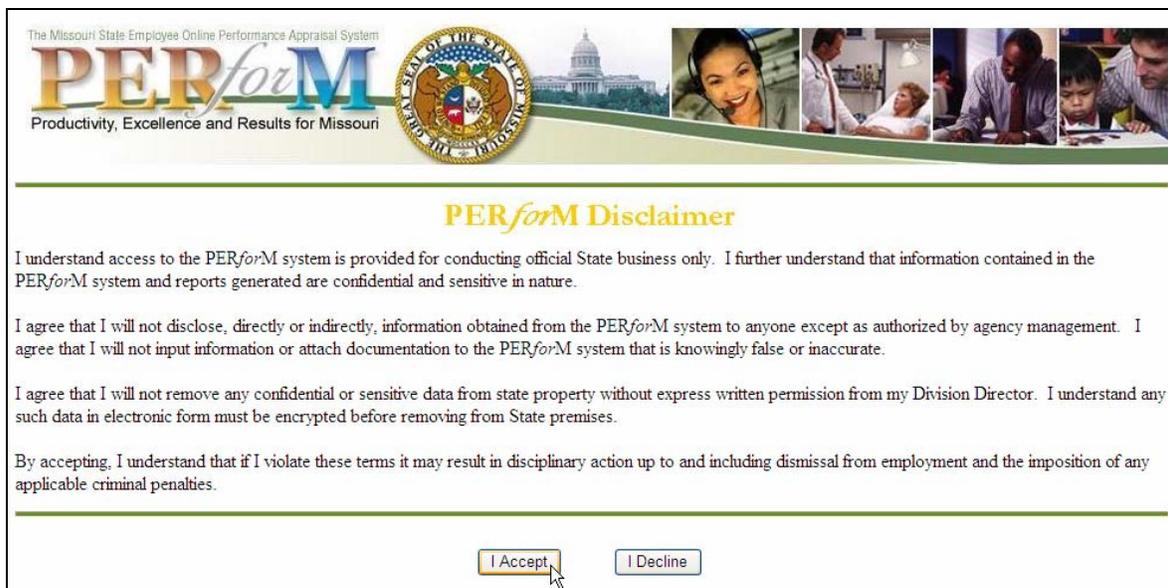
If any deviation to routine maintenance beyond those listed above must occur, notice will be sent to each applicable agency HR Director for distribution to appropriate staff.

# Accessing the PERforM Training Environment

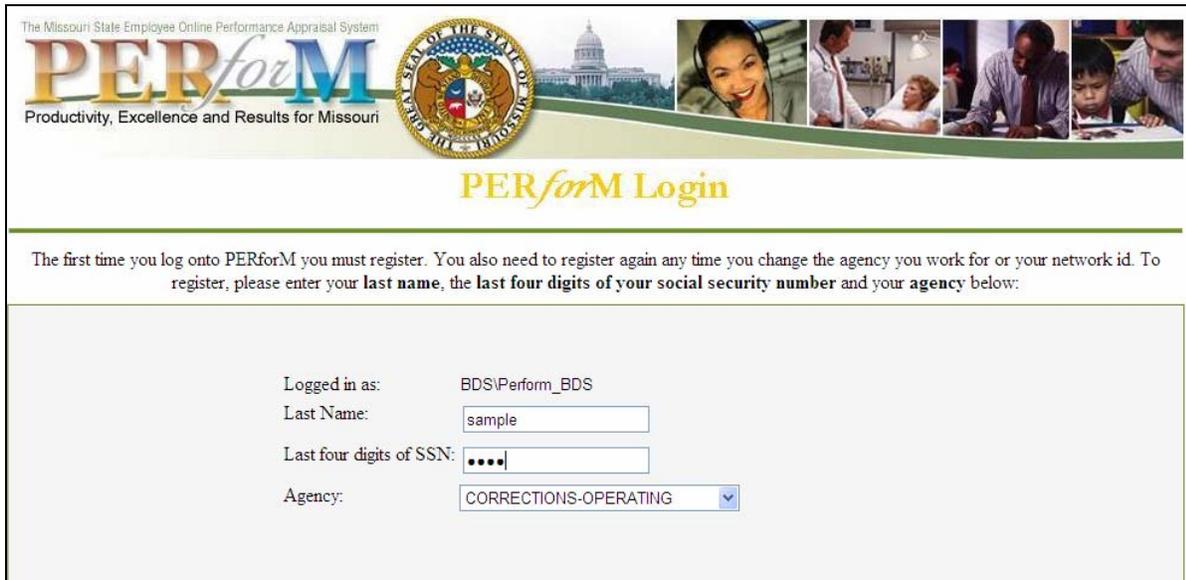
1. Open an internet browser and enter the address <http://performtrng.oa.state.mo.us/PERforM/>
2. Log on as yourself. (i.e. use your normal network domain \userid and password)



3. Click the "I Accept" button:



4. Register in PERforM using the supplied registration information
  - a. Last name = Sample
  - b. Last 4 digits of ssn = **Use your assigned 4 digit number**
  - c. Agency = Select your agency from the drop-down list



The Missouri State Employee Online Performance Appraisal System

**PERforM**  
Productivity, Excellence and Results for Missouri

PERforM Login

The first time you log onto PERforM you must register. You also need to register again any time you change the agency you work for or your network id. To register, please enter your **last name**, the **last four digits of your social security number** and your **agency** below:

Logged in as: BDS\Perform\_BDS

Last Name:

Last four digits of SSN:

Agency:

- d. Note: The agency and/or last 4 digits of the ssn (assigned 4 digit training ID) should be different for each trainer. If two trainers register with the same information at the same time, there will be no errors generated; however, they will be working with the same data and any changes made by one trainer will be reflected in both sessions.
5. A message will be displayed indicating that registration was successful. Click the “Go to my Home Page” button to begin working in the PERforM training environment.



The Missouri State Employee Online Performance Appraisal System

**PERforM**  
Productivity, Excellence and Results for Missouri

PERforM Login

Registration was successful.

The Home Page contains both Rater and Reviewer links allowing functionality of both roles to be demonstrated.

The screenshot shows the PERFORM Home Page with a navigation bar at the top containing: Home, My Employees, My Reviews, System Administration, My Agency Admins, Proxy, Reports, Online Help, and Log Out. Below the navigation bar, the page is divided into two main sections: Raters and Reviewers. Each section has a 'My Employee List' and 'Performance Plans (Objectives)' subsection. The Raters section includes links for 'View My Current Employees', 'Develop/Update Performance Objectives', and 'View All Objectives Pending Employee Review'. The Reviewers section includes links for 'View All Employees I Review/Approve' and 'View Objectives of All Employees I Review'. Both sections also have a 'Performance Appraisals (Ratings and Annual Rating Exemptions)' subsection with various links for creating, updating, and reviewing appraisals.

In the role of **Rater**, Sam Sample will be responsible for appraising (rating) five employees, three of whom are supervisors.

The screenshot shows the 'My Employee List' page for a Rater role. The page header includes the PERFORM logo and the Missouri State seal. The date is Wednesday, February 13, 2008, 4:09:10 PM. The user is identified as SAM SAMPLE (OADOMAINForbiA) with the role of Reviewer Rater. The page title is 'Home Page > My Employee List'. Below the title, there is a link 'Who is required to have an annual appraisal?'. A message states: 'You are responsible for supervising and appraising the following employees. (Click on any column heading to sort data by that column in ascending order.)'. There are 7 total employees listed in the following table:

Employee Name	Title Code	Job Title	Organization	Supervisor	Annual Required
ANYONE, GEORGE Q	000023	SR OFC SUPPORT ASST (KEYBRD)	MENTAL HEALTH	No	Yes
CLEVER, KATHY A	009872	SPECIAL ASST TECHNICIAN	MENTAL HEALTH	No	No
HILL, JACK FRANKLIN	004403	PSYCHOLOGIST II	MENTAL HEALTH	Yes	Yes
SCENARIO, SHAWN LYNN	004403	PSYCHOLOGIST II	MENTAL HEALTH	Yes	Yes
SMITH, ED LEE	005283	LICENSED CLINICAL SOCIAL WKR	MENTAL HEALTH	No	Yes
TEST, TRISTAN W	004403	PSYCHOLOGIST II	MENTAL HEALTH	Yes	Yes
TURN, NICK R	004441	LICENSED PROFESSIONAL CNSLR II	MENTAL HEALTH	No	Yes

In the role of **Reviewer**, Sam Sample will be responsible for approving/disapproving appraisals submitted to him from the three raters he supervises.

The Missouri State Employee Online Performance Appraisal System  
**PERform**  
 Productivity, Excellence and Results for Missouri

Tuesday, February 05, 2008 10:14:49 AM  
 Welcome - SAM SAMPLE (BDS Perform\_BDS) your role(s): [Reviewer Rater](#)

Home My Employees My Reviews Reports Online Help Log Out

[Home Page](#) > Select Performance Appraisal

**Select Appraisal**

The following are submitted appraisals within current appraisal period (calendar year) that are ready for approval.  
 (3) appraisals

Review	Employee Name	Job Title	Organization	Supervisor	Type	Appraisal Status	Overall Rating	Last Updated Date
<a href="#">Review</a>	DOE, JON D	SECRETARY	FCC MOSOP	TEST, TRISTAN W	Annual	Pending	Successful	1/2/2008 11:39:37 AM
<a href="#">Review</a>	TEST, THOMAS LEE	SECRETARY	FRDC SUBSTANCE ABUSE	SCENARIO, SHAWN LYNN	Annual	Pending	Successful	1/2/2008 1:37:34 PM
<a href="#">Review</a>	TIME, JUSTIN K	CORRECTIONS CASEWORKER II	FRDC CLASSIFICATION	SCENARIO, SHAWN LYNN	Annual	Exempt Pending	-	1/8/2008 9:20:26 AM

## SCENARIOS TO CONSIDER

### FOR RATERS

#### Performance Plans (Objectives)

To work on objectives, click the “Develop/Update Performance Objectives” link.

Trainers can select any employee to demonstrate the following functions. However, some optional scenarios are provided.

1. Copy Objectives From and To Employees with the Same Amount of Components (Ed Smith and Nick Turn have Annual objectives established for the 5 standard components.)
  - a. Select George Anyone to develop Annual objectives for and then use the “Copy Objectives” button. Select Ed Smith to copy from.
2. Copy Objectives of One Appraisal Type to Another Appraisal Type
  - a. Between Employees: Select Kathy Clever to develop Probationary objectives for and then use the “Copy Objectives” button. Select Nick Turn and the Annual type to copy from.
  - b. For the Same Employee: Select Kathy Clever to develop Annual objectives for and then use the “Copy Objectives” button. Select Kathy’s name again and the Probationary type to copy from.
3. Copy Objectives From an Employee with 5 Components To an Employee with 8 Components
  - a. Select Tristan Test to develop Special objectives for and then use the “Copy Objectives” button. Select Ed Smith and the Annual type to copy from.
  - b. Note that objectives for supervisory or managerial staff with 8 components cannot be copied to an employee who only has 5 components.

4. Edit Objectives
  - a. Nick Turn and Ed Smith have existing Annual appraisals. Demonstrate how to edit their objectives for the new appraisal period.
  - b. Following scenarios 2a and 3a, edit text for some of Kathy Clever’s Probationary objectives or Tristan Test’s Special objectives which were copied from other employees.
5. Delete Objectives
  - a. Click the check box next to one or more objectives and use the “Delete Selected Objectives” button to remove only these objectives from the list.
  - b. Click in the check box provided for “Select All” and use the “Delete Selected Objectives” button to clear all objectives from the list.
6. Review and Print Performance Plans
7. Mark Objectives (Performance Plans) as being Reviewed with the Employee.

## Appraisals (Ratings and Rating Exemptions)

**Note:** Trainers will not be able to create an *Annual Appraisal* for Ed Smith and Nick Turn because one already exists for the current period. These appraisals can be viewed by clicking on the “Update Incomplete Appraisals/Overturn Completed Appraisals” link.

<b>Home Page</b>	
<b>Raters</b> <i>My Employee List</i> <ul style="list-style-type: none"> <li>• <a href="#">View My Current Employees</a></li> </ul> <i>Performance Plans (Objectives)</i> <ul style="list-style-type: none"> <li>• <a href="#">Develop/Update Performance Objectives</a></li> <li>• <a href="#">View All Objectives Pending Employee Review</a></li> </ul>	<i>Performance Appraisals (Ratings and Annual Rating Exemptions)</i> <ul style="list-style-type: none"> <li>• <a href="#">Create New Appraisal</a></li> <li>• <a href="#">Update Incomplete Appraisals / Overturn Completed Appraisals</a></li> <li>• <a href="#">View Current Complete and Exempt Appraisals</a></li> <li>• <a href="#">View All Complete and Exempt Appraisals</a></li> <li>• <a href="#">View All Incomplete Appraisals</a></li> <li>• <a href="#">Search Appraisals</a></li> </ul>

The following are all Incomplete Appraisals (2) appraisals

View	Employee Name	Job Title	Organization	Supervisor	Type	Appraisal Status	Last Updated Date
<a href="#">View</a>	SMITH, ED LEE	LICENSED CLINICAL SOCIAL WKR	MENTAL HEALTH	SAMPLE, SAM S	Annua	Approved	1/8/2008 11:03:25 AM
<a href="#">View</a>	TURN, NICK R	LICENSED PROFESSIONAL CNSLR II	MENTAL HEALTH	SAMPLE, SAM S	Annua	Disapproved	1/8/2008 11:02:28 AM

**Trainers can demonstrate the following appraisal-related functions:**

1. Create an appraisal in the “Quick Score” and “Normal” views
2. Add a date range to a Special or Probationary appraisal
3. Save an appraisal
4. Assign ratings for components
5. Calculate the overall appraisal score/rating
6. Include comments for components
7. Add an attachment (The trainer should have a document prepared in advance for this purpose.)
8. Delete an attachment
9. Submit an appraisal for review
10. Exempt an employee from an appraisal rating  
 Include the reason for the exemption in “Overall Comments” before clicking the “Exempt & Submit” button
11. Read and delete a sticky note  
 Sticky notes are available on Annual appraisals for Ed Smith and Nick Turn
12. Edit and resubmit an appraisal  
 Nick Turn’s Annual appraisal is in “Disapproved” status
13. Complete (finalize) a rated appraisal  
 Ed Smith’s Annual appraisal is in “Approved” status and is ready to be marked “Complete”
14. Discuss available Rater “View” links
15. Overturn and Resubmit an appraisal  
 After marking Ed Smith’s appraisal as “Complete,” it can be overturned.

The following are all Incomplete Appraisals (Q) appraisals

<a href="#">View</a>	Employee Name	Job Title	Organization	Supervisor	Type	Appraisal Status	Last Updated Date
<a href="#">View</a>	SMITH, ED LEE	LICENSED CLINICAL SOCIAL WKR	MENTAL HEALTH	SAMPLE, SAM S	Annua	Approved	1/8/2008 11:03:25 AM
<a href="#">View</a>	TURN, NICK R	LICENSED PROFESSIONAL CNSLR II	MENTAL HEALTH	SAMPLE, SAM S	Annua	Disapproved	1/8/2008 11:02:28 AM

## FOR REVIEWERS

- View objectives developed by Raters who are supervised by the Reviewer  
 Note: Objectives cannot be approved or disapproved in PERforM. The Reviewer will have to discuss proposed revisions to the objectives with the Rater.

### Performance Plans (Objectives)

- [View Objectives of All Employees I Review](#)

- Review an appraisal

There are 3 appraisals available for review. This is done by clicking on the “Review/Approve Pending Appraisals” link.

<b>Reviewers</b> <b>My Employee Review List</b> <ul style="list-style-type: none"> <li><a href="#">View All Employees I Review/Approve</a></li> </ul> <b>Performance Plans (Objectives)</b> <ul style="list-style-type: none"> <li><a href="#">View Objectives of All Employees I Review</a></li> </ul>	<b>Performance Appraisals (Ratings and Annual Rating Exemptions)</b> <ul style="list-style-type: none"> <li><a href="#">Review/Approve Pending Appraisals</a></li> <li><a href="#">View All Incomplete Appraisals</a></li> <li><a href="#">View All Appraisals Pending Employee Review</a></li> <li><a href="#">View All Complete and Exempt Appraisals</a></li> </ul>
--	--

The following are submitted appraisals within current appraisal period (calendar year) that are ready for approval.  
 (3) appraisals

Review	Employee Name	Job Title	Organization	Supervisor	Type	Appraisal Status	Overall Rating	Last Updated Date
<a href="#">Review</a>	DOE, JON D	SECRETARY	FCC MOSOP	TEST, TRISTAN W	Annual	Pending	Successful	1/2/2008 11:39:37 AM
<a href="#">Review</a>	TEST, THOMAS LEE	SECRETARY	FRDC SUBSTANCE ABUSE	SCENARIO, SHAWN LYNN	Annual	Pending	Successful	1/2/2008 1:37:34 PM
<a href="#">Review</a>	TIME, JUSTIN K	CORRECTIONS CASEWORKER II	FRDC CLASSIFICATION	SCENARIO, SHAWN LYNN	Annual	Exempt Pending	-	1/8/2008 9:20:26 AM

- View an attachment
  - The appraisals for Thomas Test and John Doe have attachments
- Approve an appraisal that contains a rating
- Approve an appraisal that contains an exemption
  - The appraisal for Justin Time is in “Exempt Pending” status
- Add a sticky note
- Disapprove an appraisal

8. Discuss remaining Reviewer “View” links (i.e., *View All Incomplete Appraisals*; *View All Appraisals Pending Employee Review*, etc.)

<p><b>Reviewers</b></p> <p><i>My Employee Review List</i></p> <ul style="list-style-type: none"> <li><a href="#">View All Employees I Review/Approve</a></li> </ul> <p><i>Performance Plans (Objectives)</i></p> <ul style="list-style-type: none"> <li><a href="#">View Objectives of All Employees I Review</a></li> </ul>	<p><i>Performance Appraisals (Ratings and Annual Rating Exemptions)</i></p> <ul style="list-style-type: none"> <li><a href="#">Review/Approve Pending Appraisals</a></li> <li><a href="#">View All Incomplete Appraisals</a></li> <li><a href="#">View All Appraisals Pending Employee Review</a></li> <li><a href="#">View All Complete and Exempt Appraisals</a></li> </ul>
--	---

The Missouri State Employee Online Performance Appraisal System

**PERFORM**  
Productivity, Excellence and Results for Missouri

Tuesday, February 05, 2008 10:17:44 AM

Welcome - SAM SAMPLE (BDS Perform\_BDS) your role(s): [Reviewer Rater](#)

Home My Employees My Reviews Reports Online Help Log Out

[Home Page](#) > Select Appraisal

**Select Appraisal**

*This is a historical list which allows you to review appraisals for the most recent rating period that are in "Complete" status for the current employees of the Raters under your responsibility.*

(1) appraisals

<a href="#">View</a>	<a href="#">Employee Name</a>	<a href="#">Job Title</a>	<a href="#">Organization</a>	<a href="#">Supervisor</a>	<a href="#">Type</a>	<a href="#">Appraisal Status</a>	<a href="#">Overall Rating</a>	<a href="#">Last Updated Date</a>
<a href="#">View</a>	SMITH, SUE A	FUNCTIONAL UNIT MGR CORR	FCC SRU	TEST, TRISTAN W	Annual	Complete	Successful	1/2/2008 1:26:48 PM

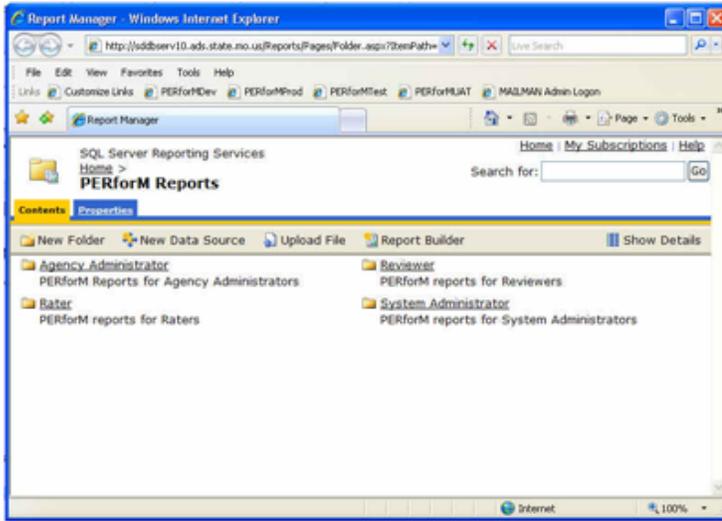
# Reports

Because the training environment is “manufactured,” reporting functionality is not available for demonstration purposes.

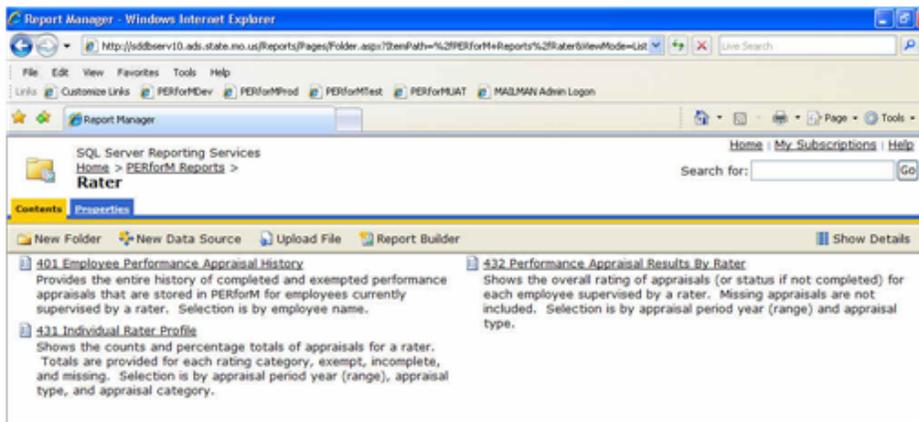
Trainers will see examples of report screens when they click the Reports link.

The PERforM Training Region is not set up to access Reports. See examples below of some of the Report screens.

Please close this page to return to the PERforM Training Region.



This is an example of the PERforM Reports Main Menu.



This is an example of the Rater's Reports Menu page.

