# 9.1 e-Performance

## Creating Performance Plans – Job Aid for Managers

Georgia™

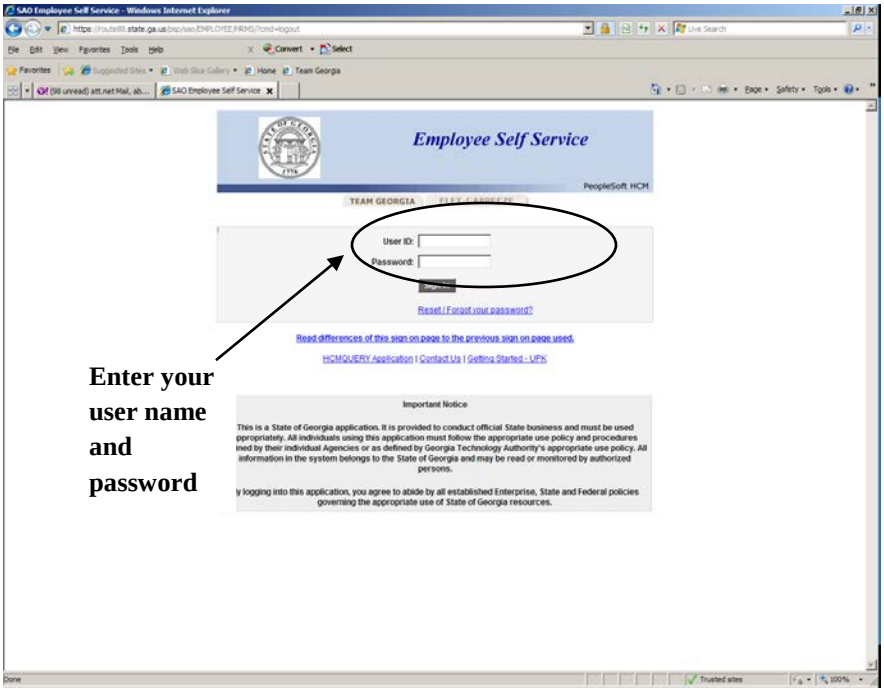
Department of
Administrative Services

## Creating Performance Plans

After HR Administrators have created the documents for the current fiscal year (or the manager has cloned their direct reports' performance plans for the current fiscal year) the employee, manager, and manager's manager all have an active role in the performance planning process.

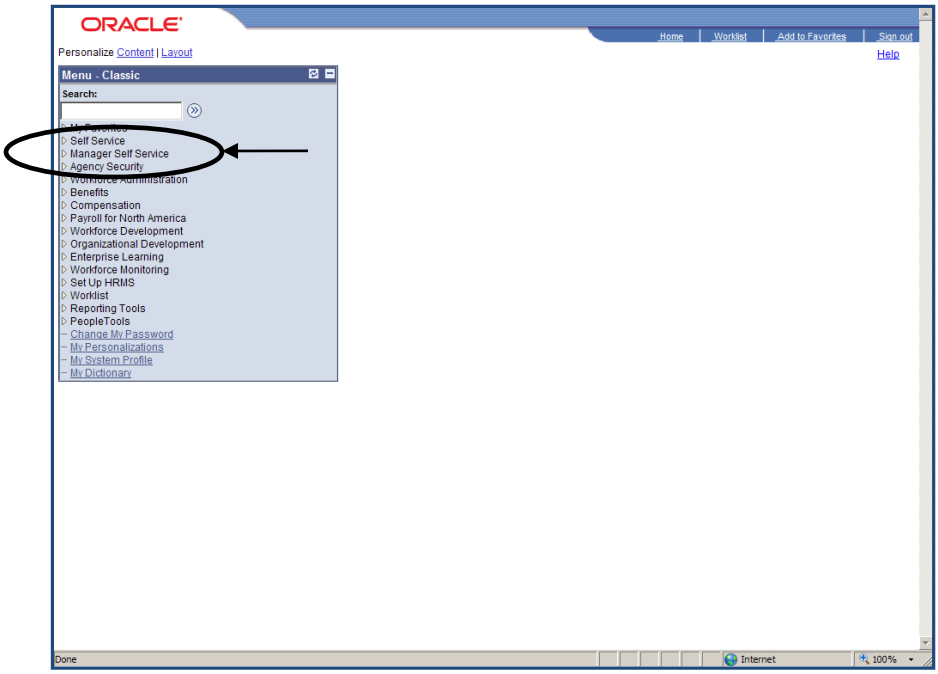
This document includes the steps that managers should follow to complete the Establish Employee Criteria Step when creating performance plans.

**Step 1: Log into the Route 88 URL [https://route88.state.ga.us](https://route88.state.ga.us)**

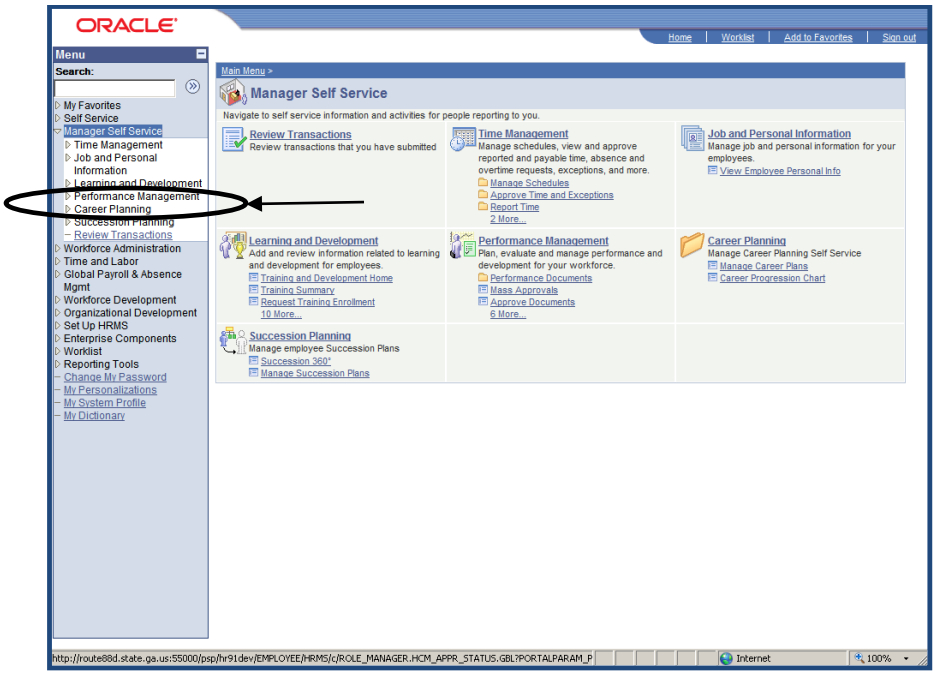



Logging in on this screen will take you directly to the Main Menu screen for PeopleSoft HCM.

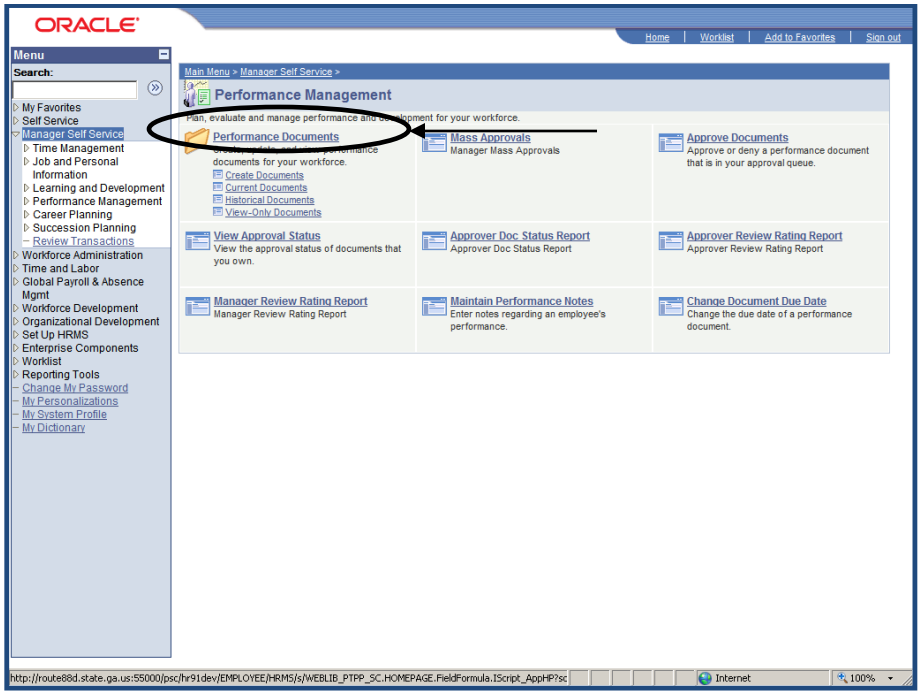
## Step 2: Click on Manager Self-Service



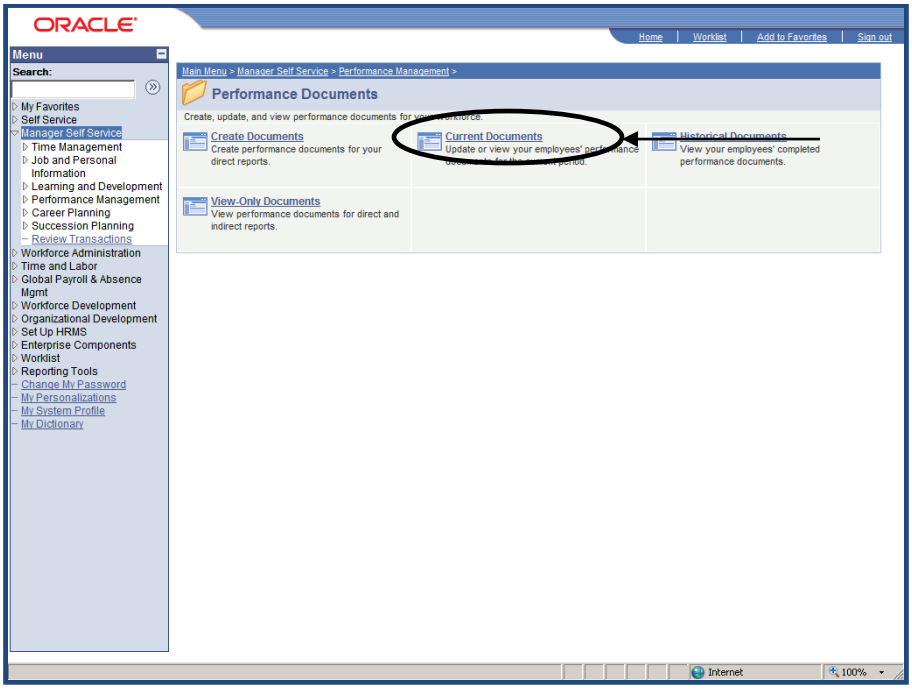

## Step 3: Click Performance Management



## Step 4: Click on Performance Documents

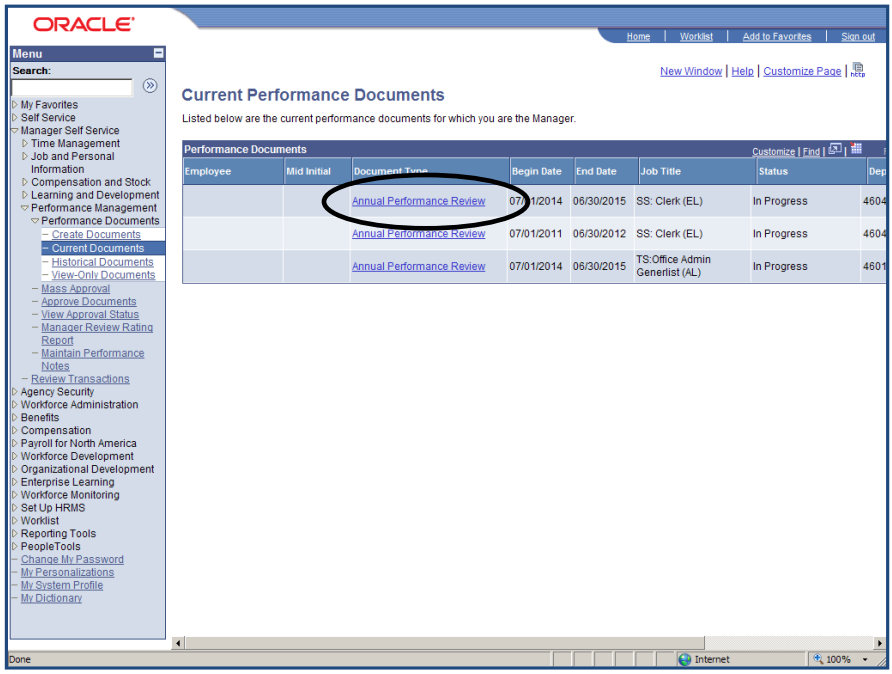



## Step 5: Click on Current Documents



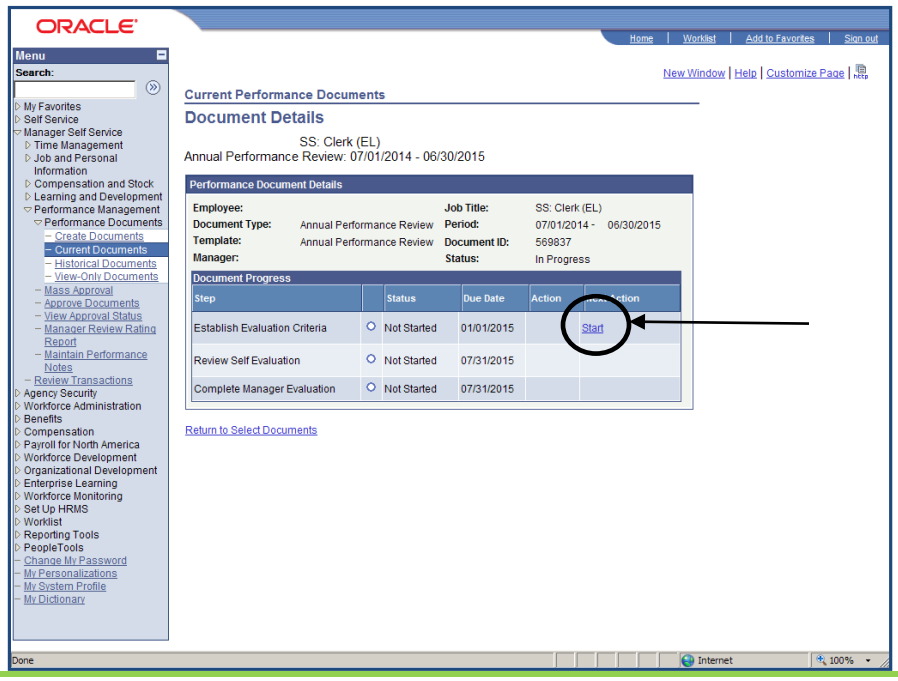
**Step 6: Click on the employee's document.**

**Note:** Click on the applicable document (Annual Performance Review, Mid-Year Performance Review or Quarterly Performance Review). Based on where you are in the performance cycle, you may see multiple links for each employee (as shown below). When starting your plans, be sure to choose the link for the appropriate begin/end dates.



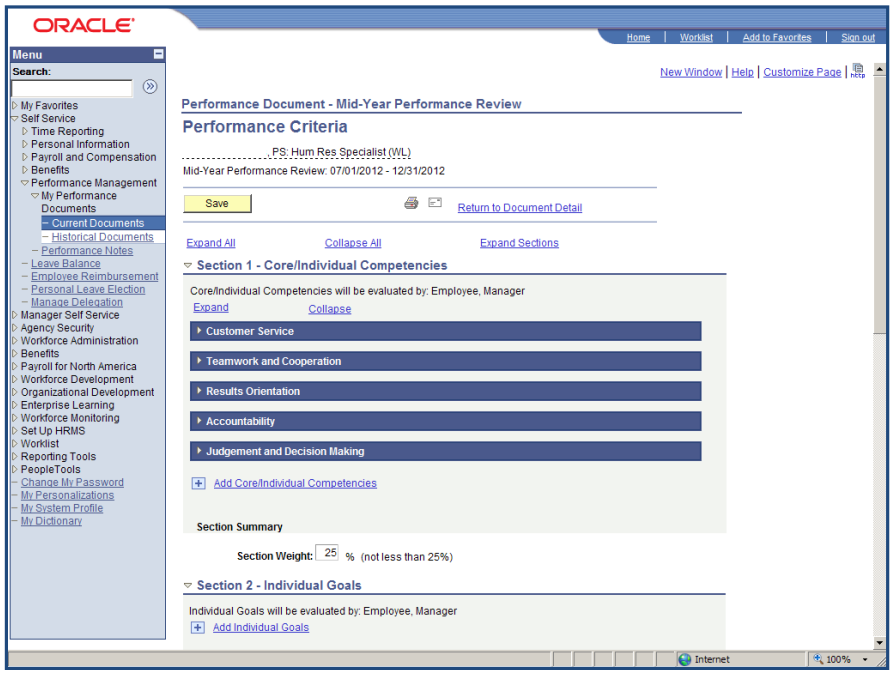

**Note:** All of the manager's direct reports documents should be listed. If you do not see all of your direct reports, contact your agency's HR Administrator.

**Step 7: Click on Start next to Establish Evaluation Criteria**



**Note:** If this step has been previously started without completing, the **Start** button will no longer appear. You will need to click on **Edit** in order to continue this process.

## Section 1: Core/Individual Competencies




The Statewide Core Competencies are pre-populated for all employees. Based on the employee's role, additional competencies would have to be added to this section.

There are five Statewide Core Competencies.

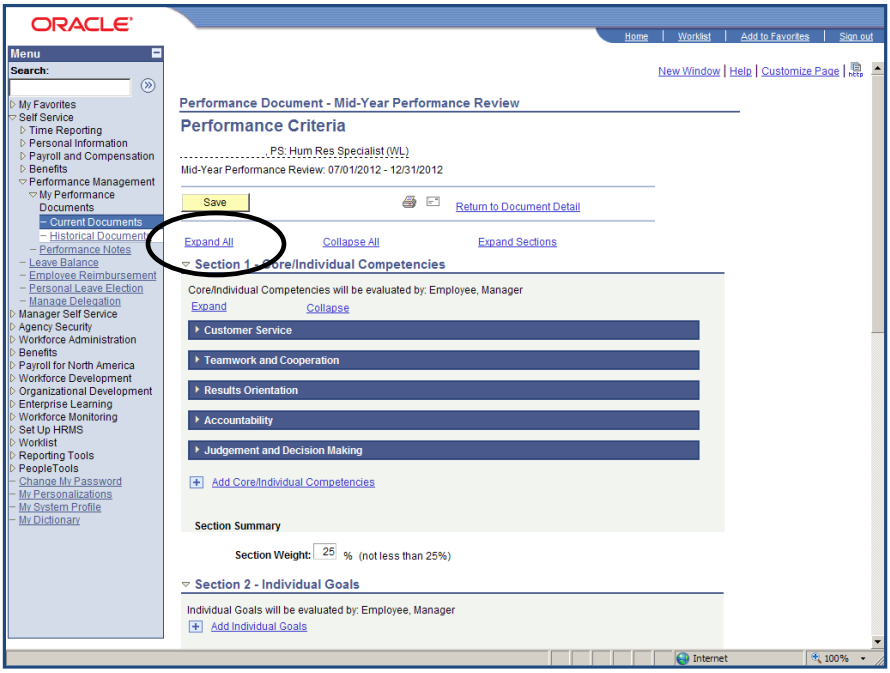
- Customer Service Orientation
- Teamwork and Cooperation
- Results Orientation
- Accountability
- Judgment and Decision Making

There are two additional Leadership Competencies pre-populated for employees in managerial jobs.

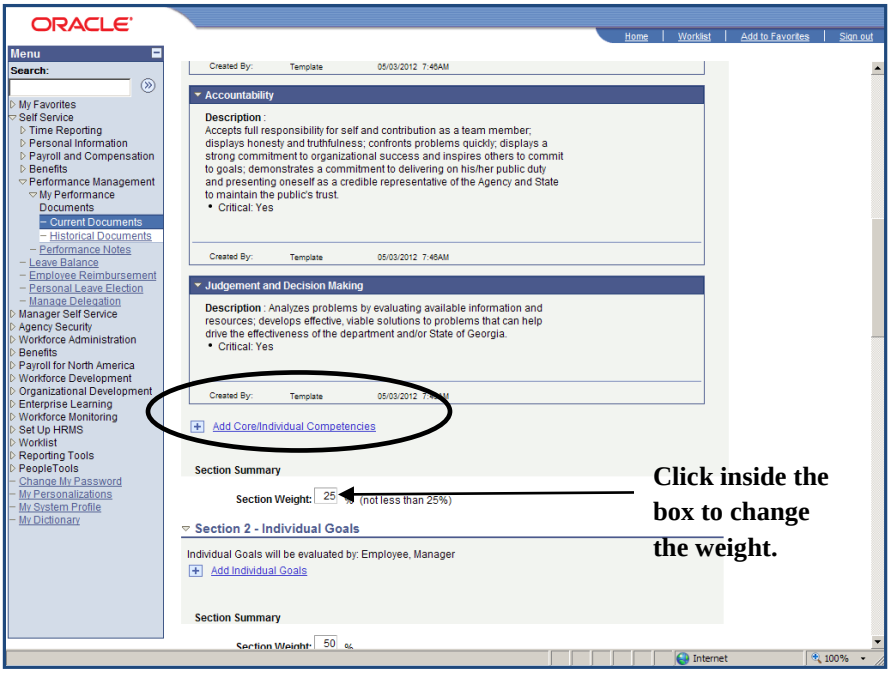
- Transformers of Government
- Talent Management

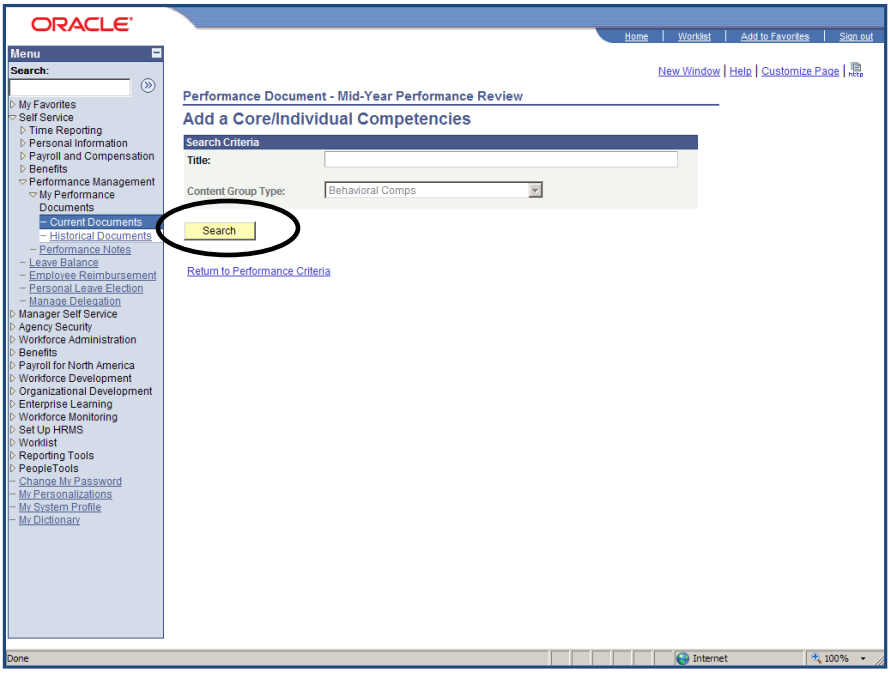
**Note**: If your Manager's plan does not have the two additional Leadership Core Competencies they can be added in Section 1 along with the additional Competencies.

Click the **Expand All** link to view the details of each Core/Individual Competency.



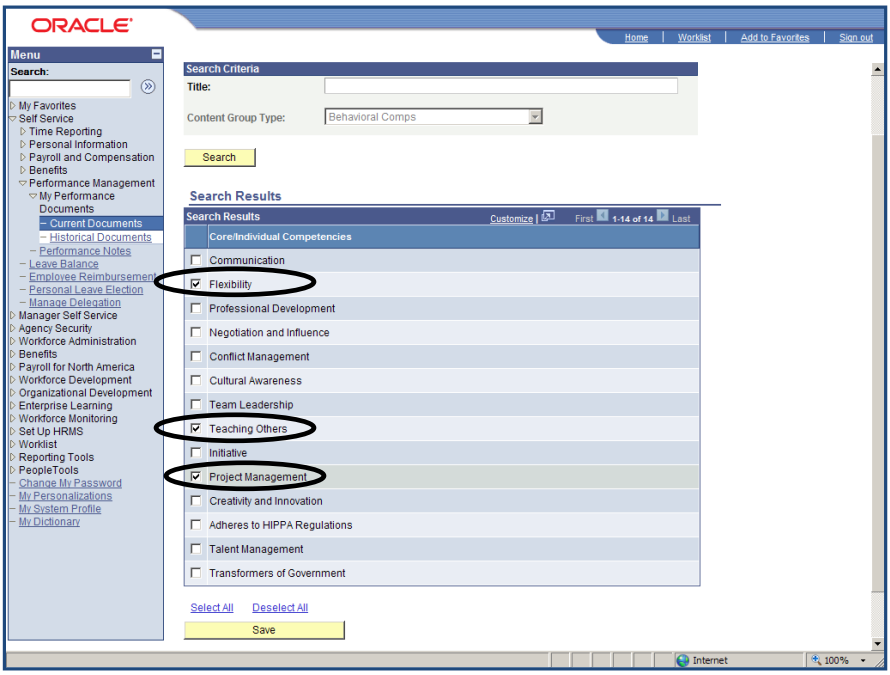

**Step 8: If additional competencies need to be added to the performance document, click on the "Add Core/Individual Competencies link.**



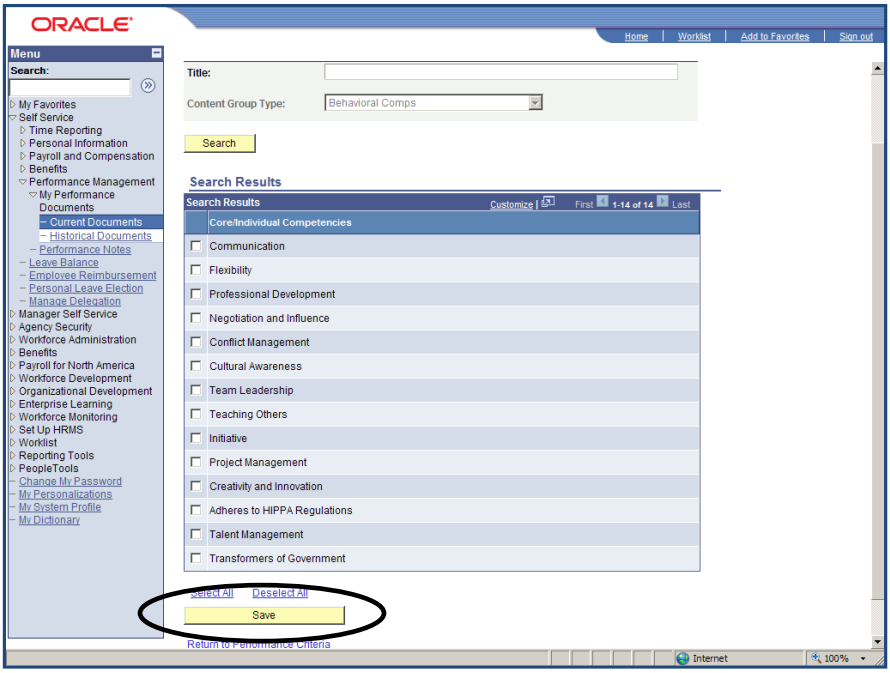


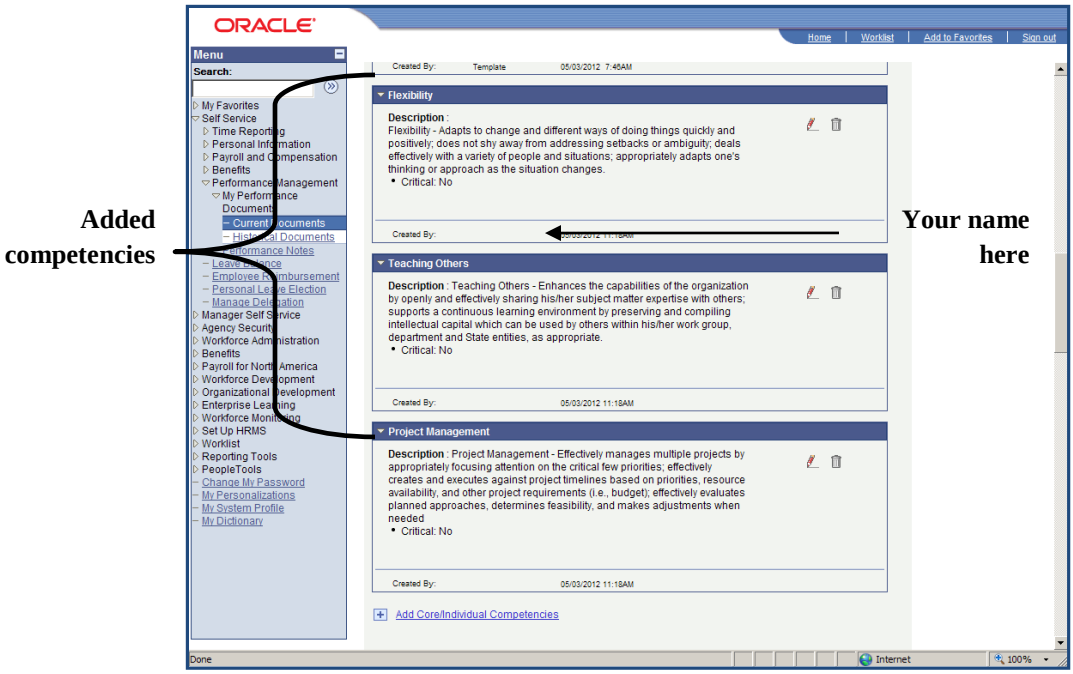

If you know the Competency you would like to add to the performance document, type it in the **"Title"** field. To see a complete listing of the Behavioral Competencies that can be added to the document, click on the **"Search"** button.

Select the additional competencies to be added and click the **"Save"** button.




**Note:** A check mark will appear in the box next to the selected competencies.



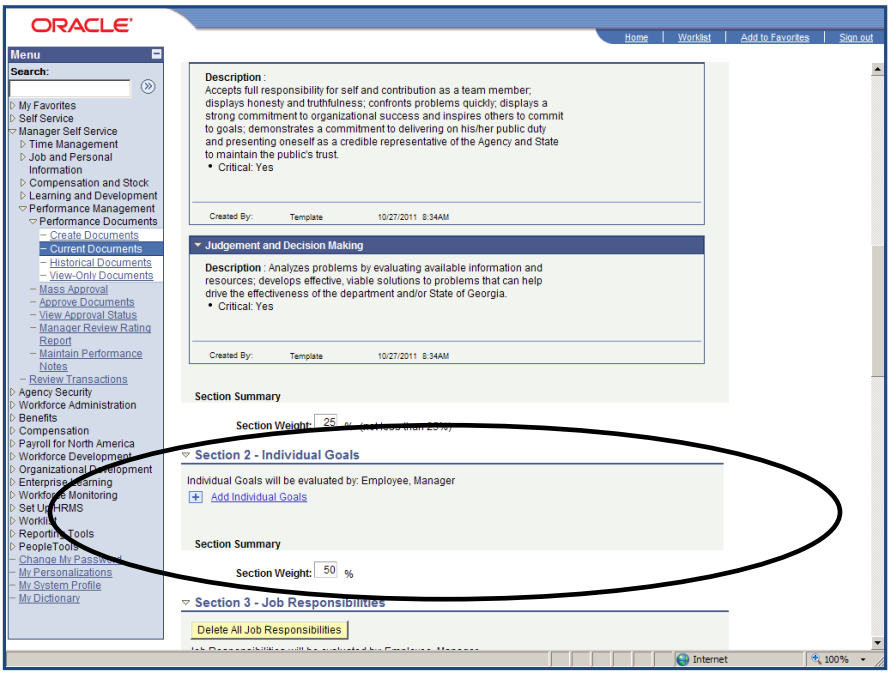

**Note:** The additional Competencies will now appear at the bottom of the first 5 competencies. You will also see your name listed by "Created by" as the person who added the competencies to the performance document.

**Step 9: Scroll down to the bottom of Section 1 and change the weighting based on your agency's procedures.**

## Section 2: Individual Goals

This section is not pre-populated. The Manager must add their own SMART goals for each employee.

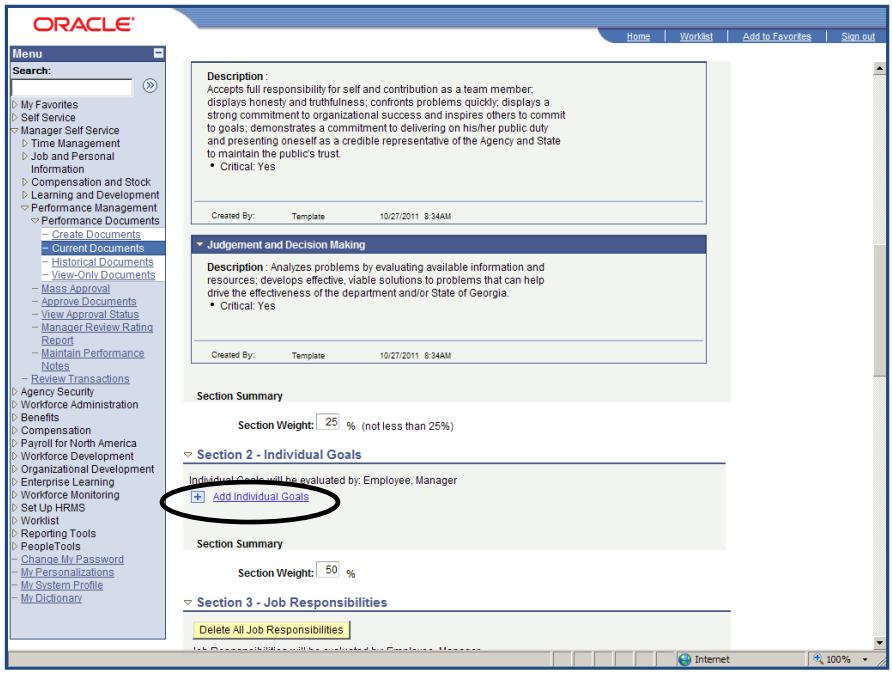
If your agency uses this section, continue with step 10. If your agency does not use this section, continue with step 14.



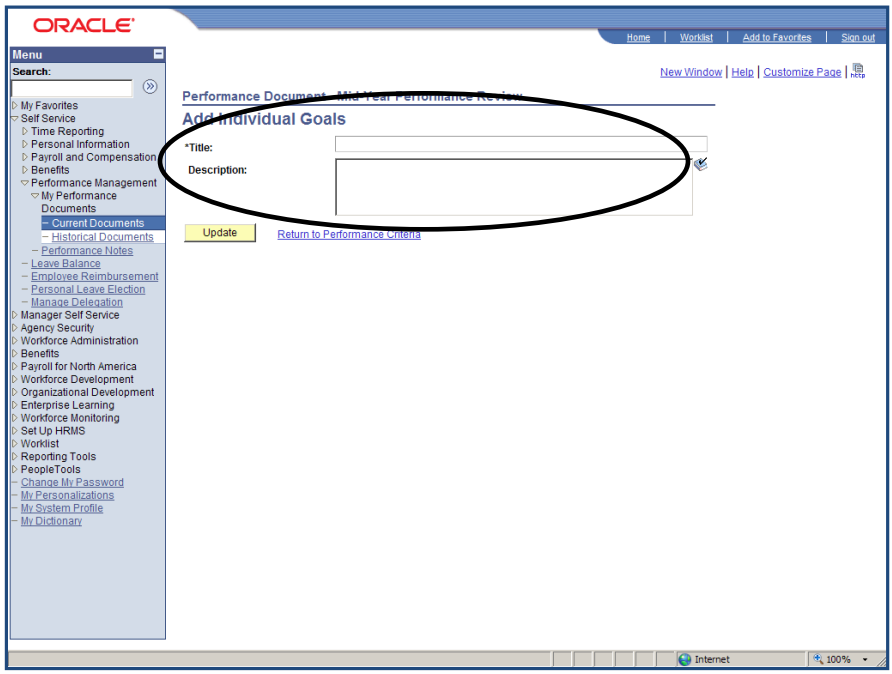

When working in this section, it is highly recommended that you:

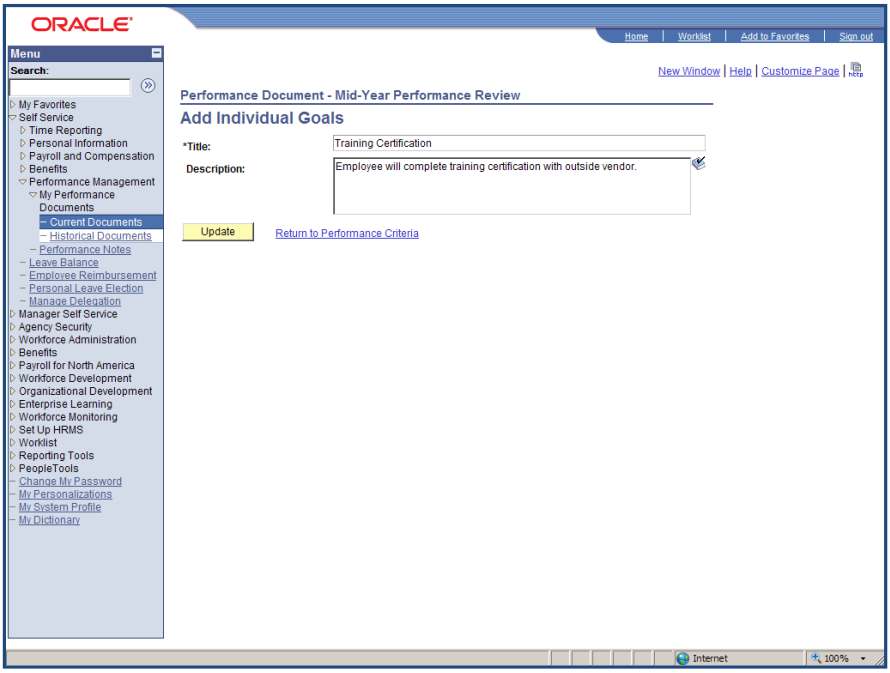
1. Type your goals and save them in a Word document. You can then copy/paste them into the system.
2. Save your data <u>often</u> by clicking the **Save** button at the top of the plan.

**Step 10: Add your own goal(s). Click on the "<u>Add Individual Goals</u>" link.**

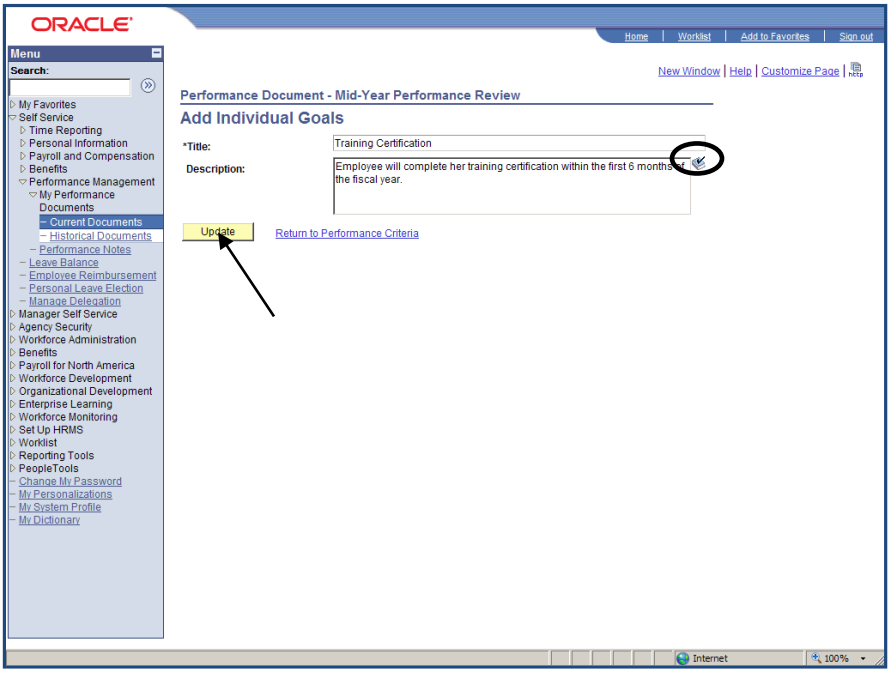



**Step 11: Enter the title and the description for the goal you would like to add.** When writing goals ensure they are measurable outcomes that identify results and outcomes expected from the employee including how they will be evaluated.

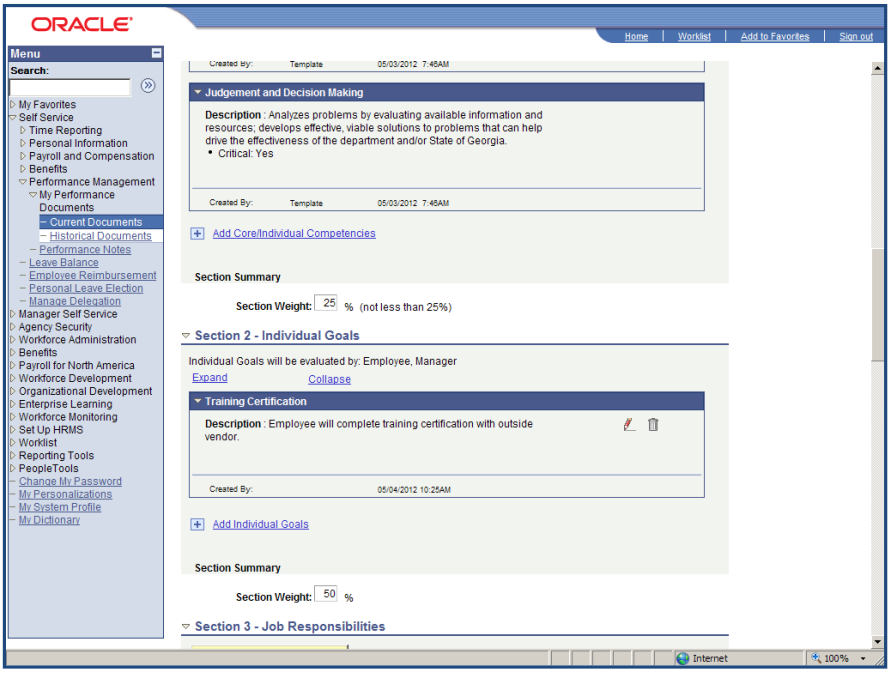





**Step 12: Click the <u>Update</u> button and the goal will be added to the performance plan.**




**Note:** Click on the book icon to check the spelling.




The goal has now been added to Section 2.

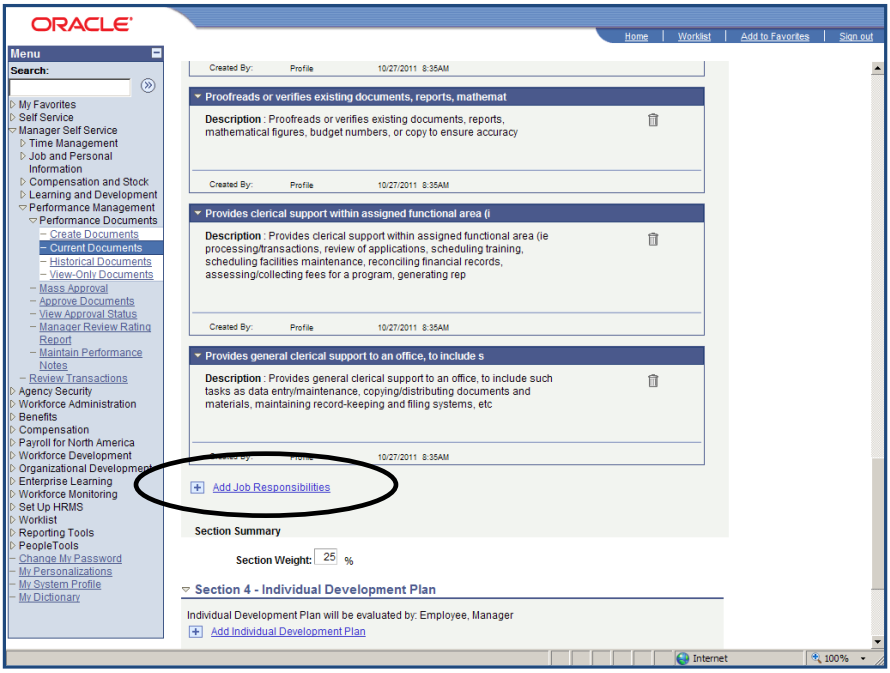
**Step 13: Scroll down to the bottom of Section 2 and change the weightings based on your agency's procedures.**

**Note**: If you are not using this section, the section weight should be changed to 0.

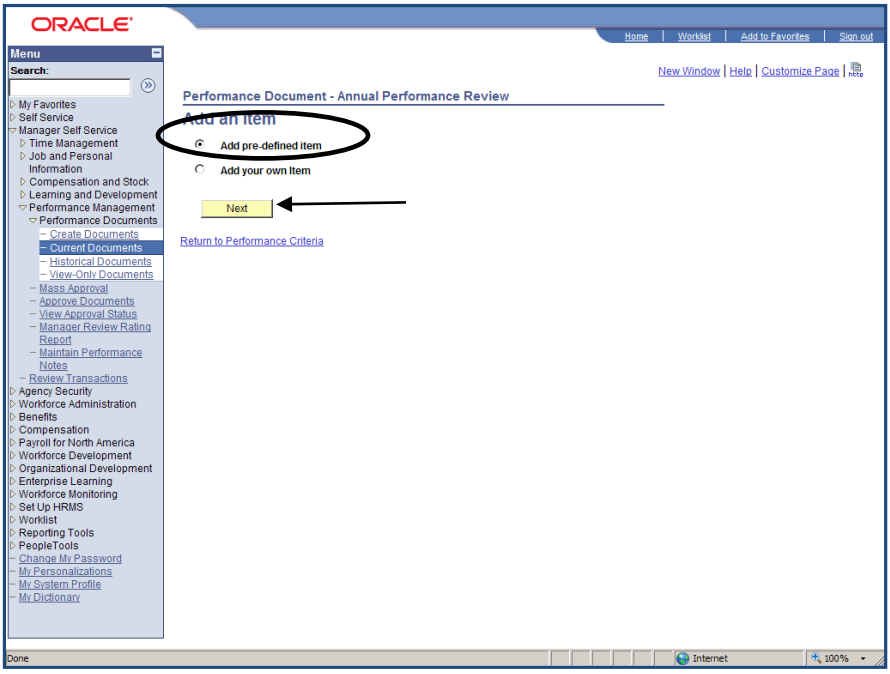
## Section 3: Job Responsibilities

This section is automatically populated with job responsibilities based on the state job description. The purpose of this is to help the manager identify those areas that are most important to the employee's success in the position. Job responsibilities can, and should be deleted from the performance plan as needed. If your agency uses this section, continue with step 14. If your agency does not use this section, continue with step 18.

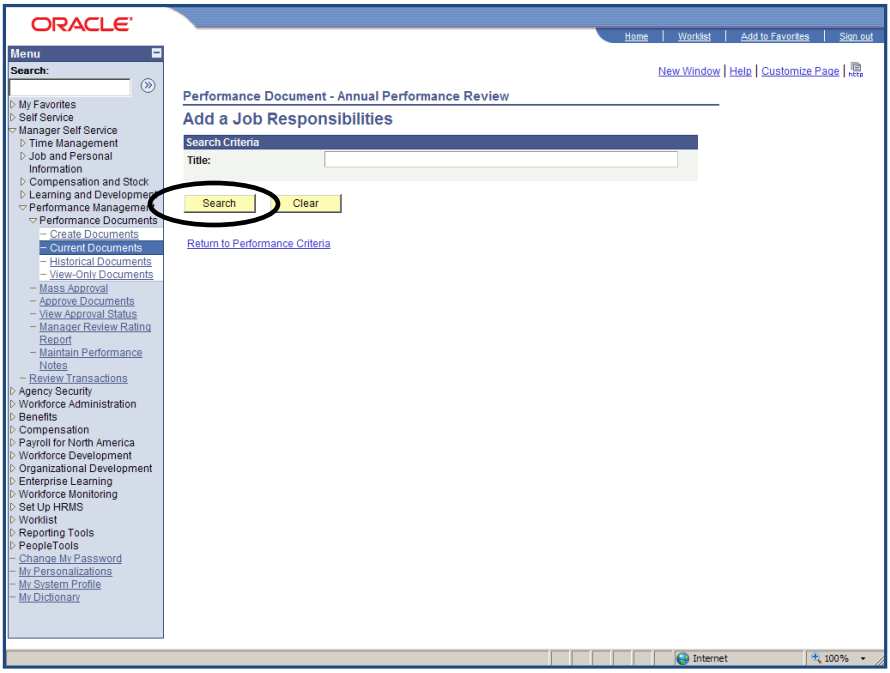
**Step 14: If your agency uses the Job Responsibilities section, review the job responsibilities listed. Click on "Add Job Responsibilities" located under any job responsibilities to add additional job responsibilities.**



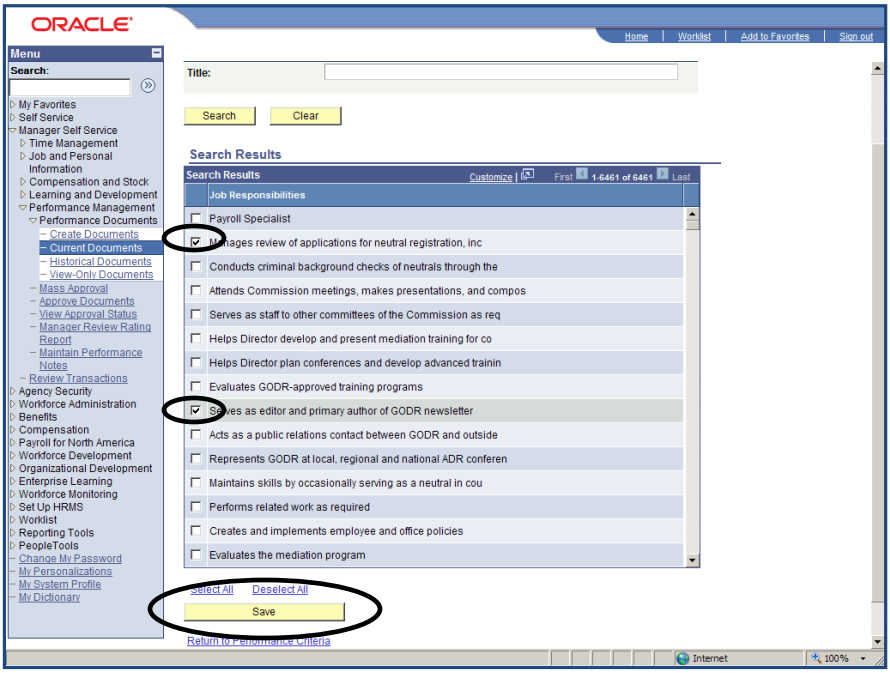

**You may select to "Add a pre-defined item" or "Add your own item"**




**Click "Next" to continue.**



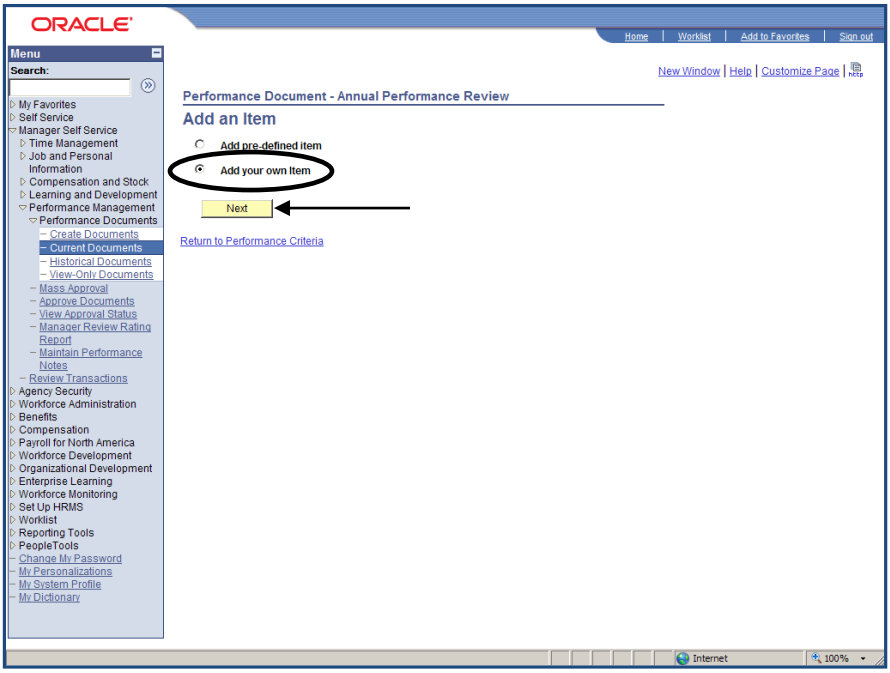

**You may type in the title of the job description then click "Search" or click on "Search" to see a list of available job descriptions.**

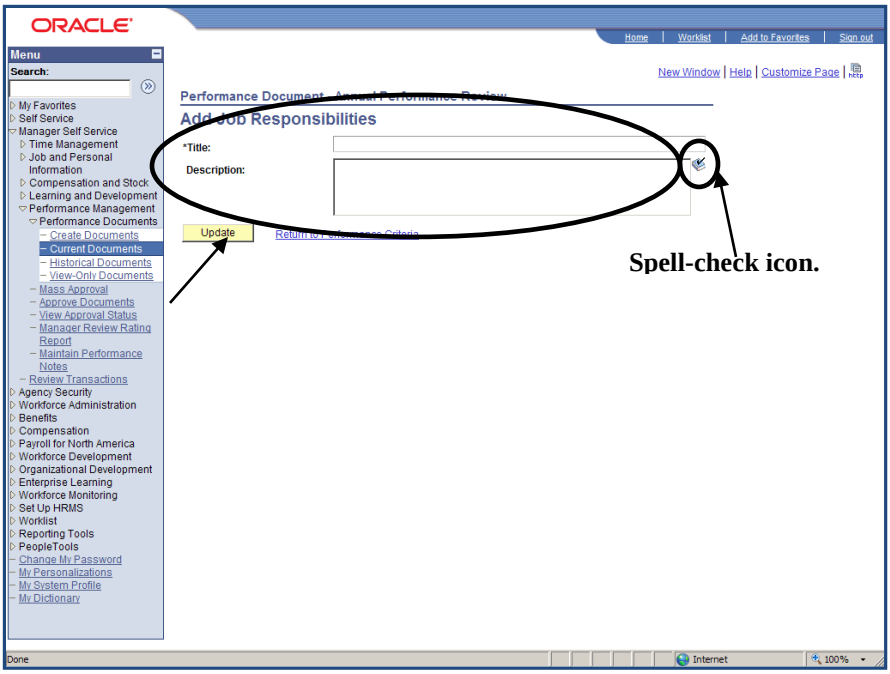



**Individually select the additional job descriptions to be added to the document and click "Save".**

**Note:** The additional job responsibilities will be added at the bottom of the pre-populated job descriptions.

**To "Add your own item, select this option and click "Next"**

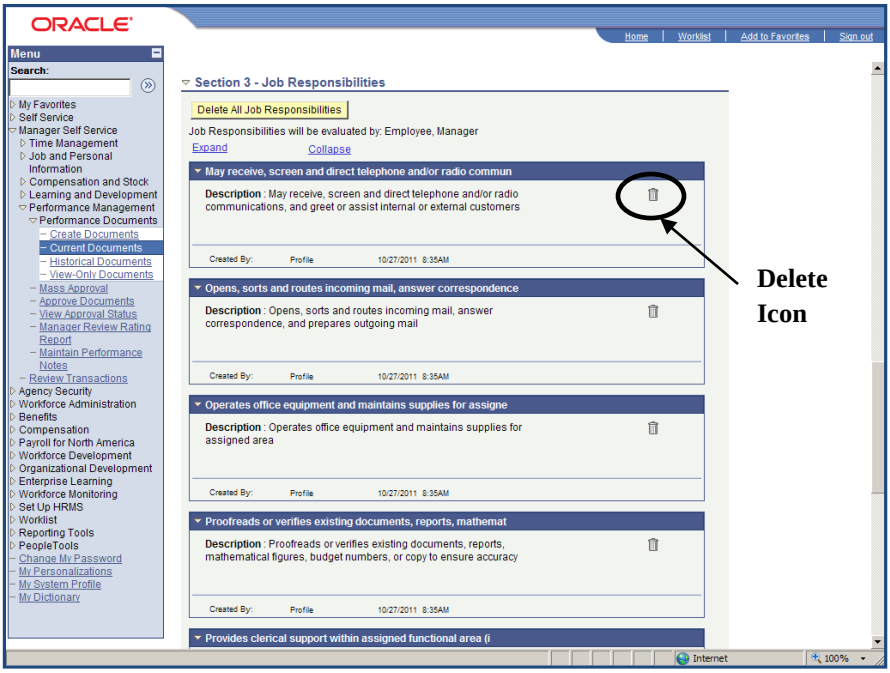


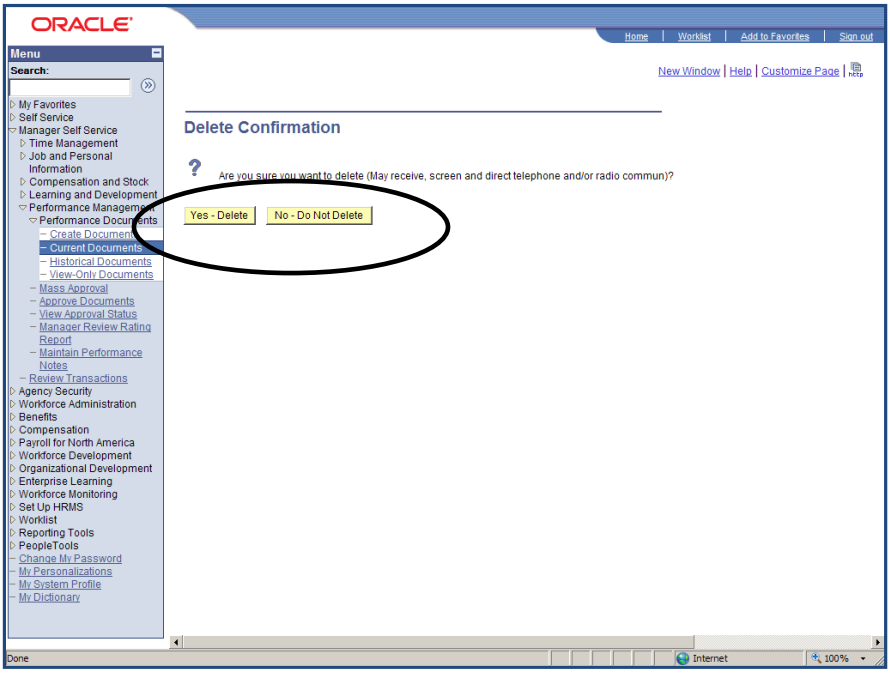

**Type the title of the additional job responsibility in the Title field, and then click on "Update".**

**Note:** You may spell check your description, by clicking on the spell check icon.

**Step 15: If you need to delete individual job responsibilities click on the "Delete" icon.**

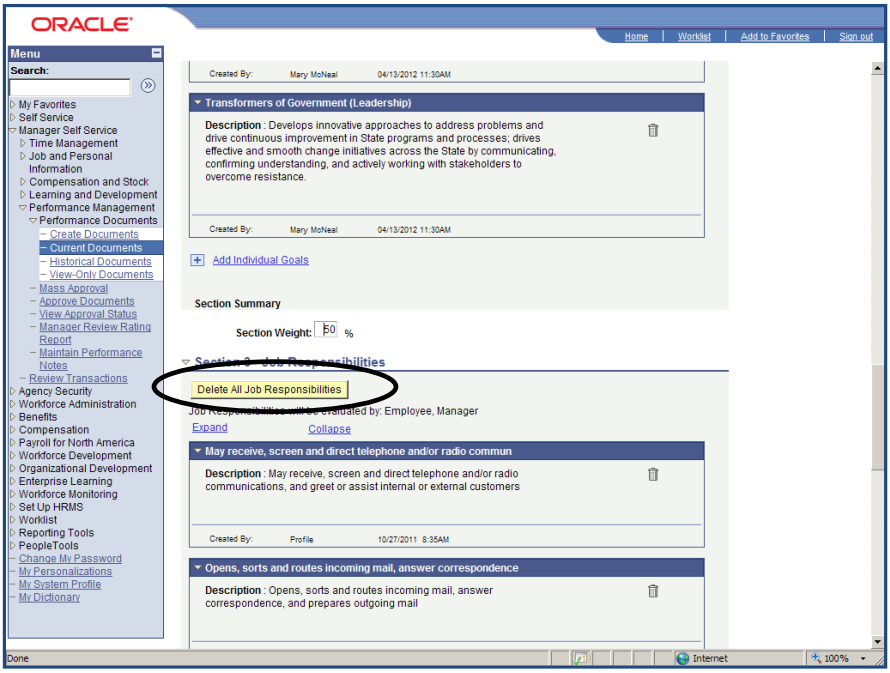



The system will ask you to confirm the Deletion, select the appropriate response.

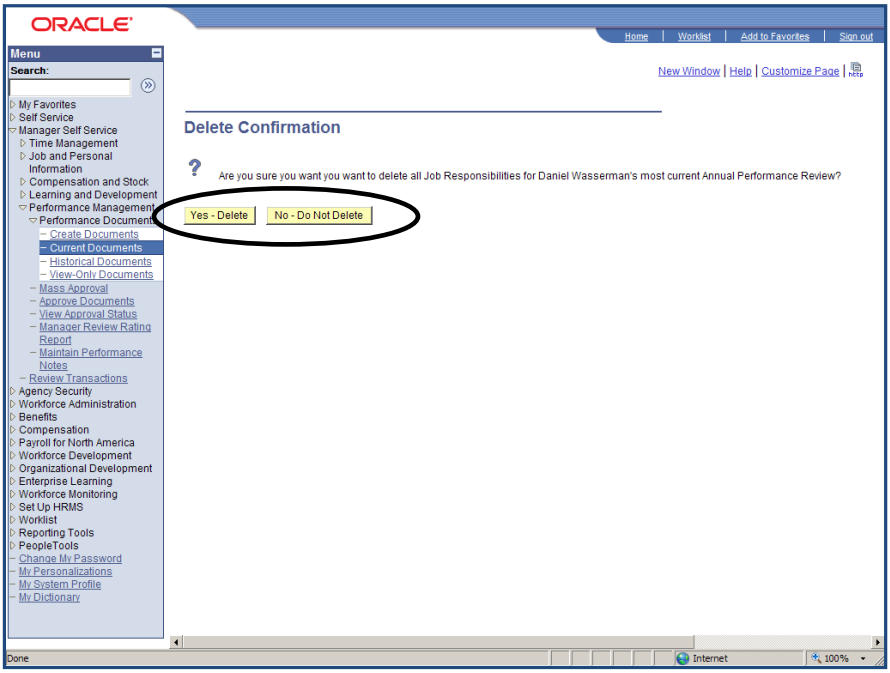



**Note:** Once you select **"Yes – Delete"**, the job responsibility will be deleted from the list of job responsibilities. However if you need to add the job responsibility back to the document, go back to **Step 14**.

**Step 16: If your agency does not use this section, click on the "Delete All Job Responsibilities.**

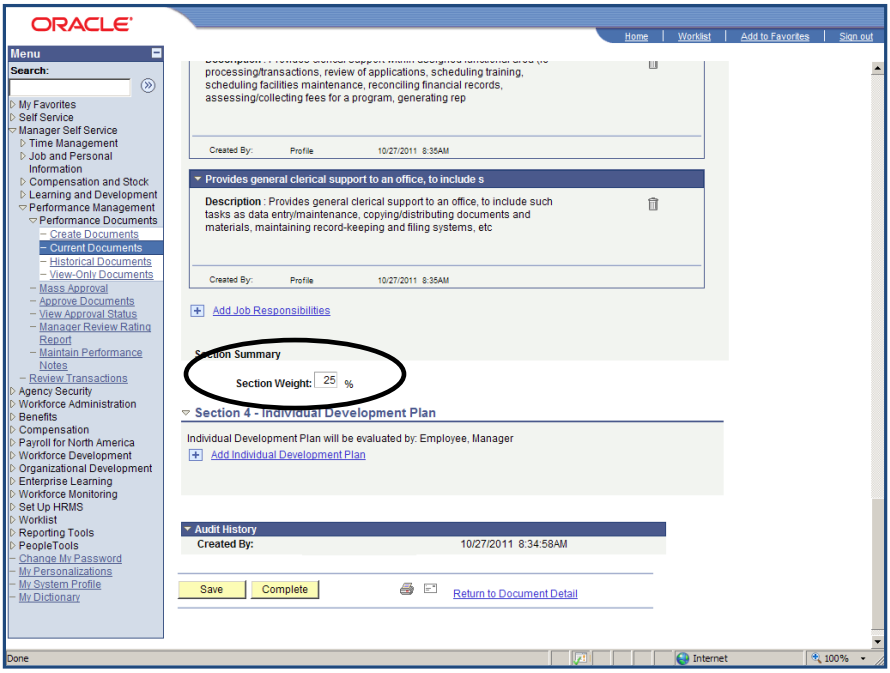



After clicking on **Delete All Job Responsibilities** you will be asked to confirm the deletion. Select the appropriate response.




**Note:** Once you delete the job responsibilities, they are removed from the document. However if you decide that some or all of them need to be added back to the document you will have to complete this process by adding them back individually.

**Step 17: At the bottom of Section 3, change the weight according to your agency's procedures.**



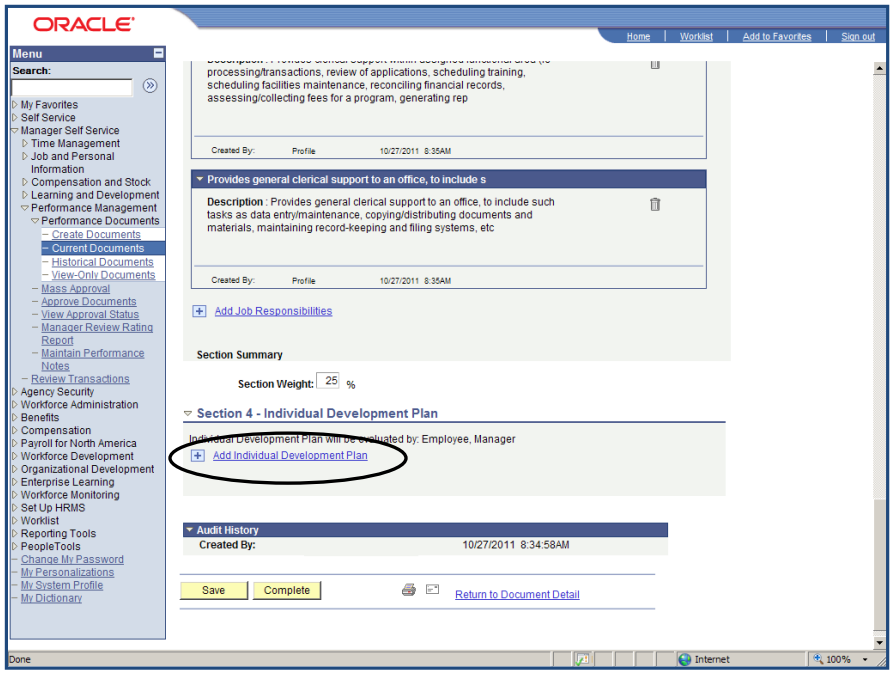

**Note**: If you are not using this section, the section weight should be changed to 0.

**Note:** When you have completed the applicable sections 1, 2 and/or 3, check to ensure that the weights for each section add up to equal 100% and are in line with your agency's procedures.

## Section 4: Individual Development Plan

An individual development plan should be created by the manager with the employee's input. The plan should identify goals, activities, projects, classes, assignments, and other activities that further contribute to the development of the employee.

## Step 18: Click "Add Individual Development Plan




Section 4 can be used to focus on several areas:

1. Development in the current role

- Applies to employees who are new in the job and need developmental activities to help them become a fully successful performer
- Employees who are deficient in their current role (not functioning at the level they need to be in order to be fully successful in their job)

2. Expand skill set and knowledge areas

- Employees who are fully successful in their current position and could benefit from some special assignments and activities to expand their skill set and move them towards exceptional performance in their current job.

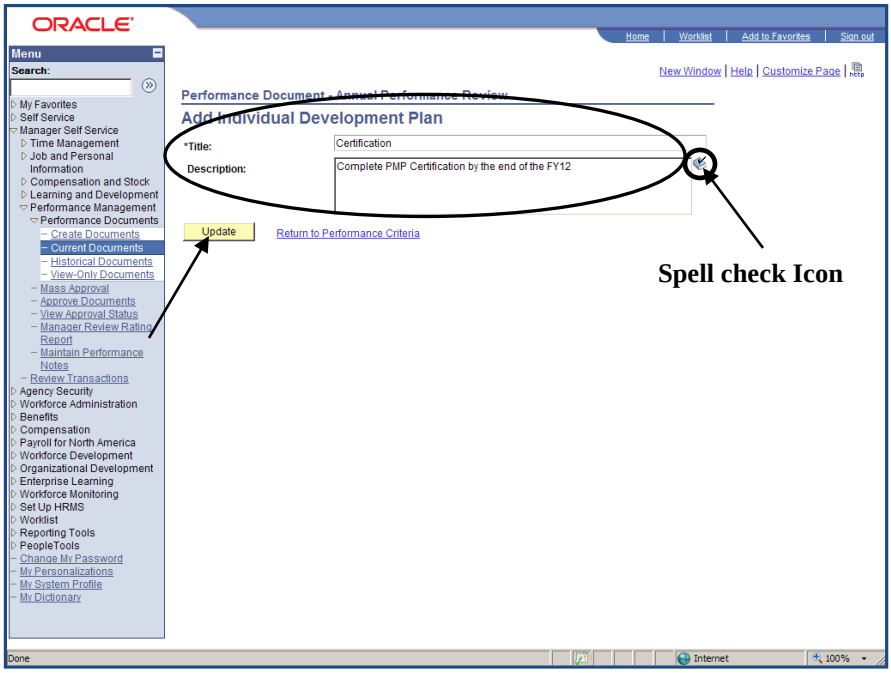
3. Prepare for future roles

- Developmental activities and goals that will develop an employee for future career opportunities in the Agency or State.

**Notes:**

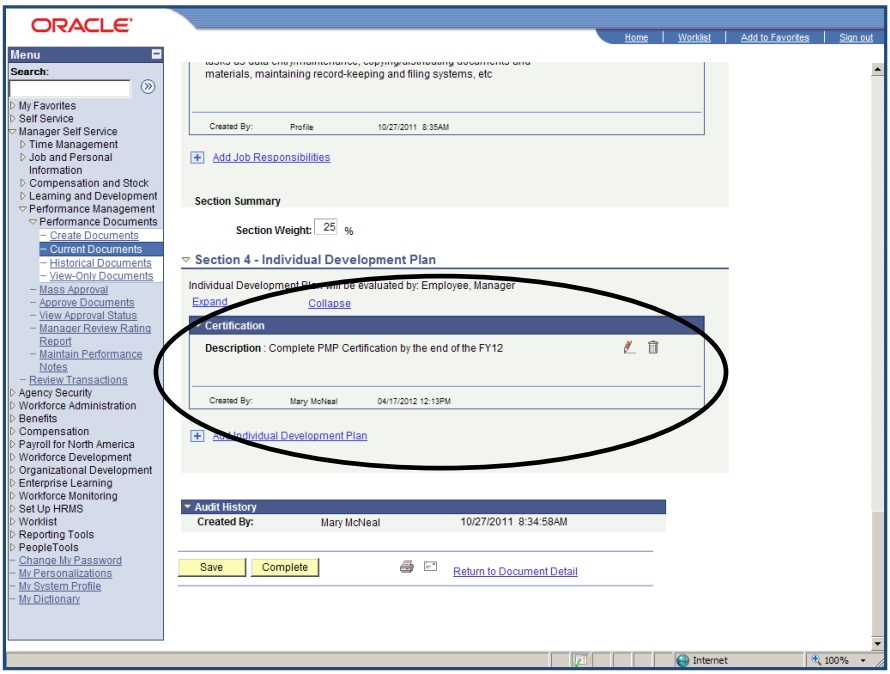
1. Add development goals the same way you add goals in Section 2 or job responsibilities in Section 3.

2. This section is not weighted and will not be evaluated.




**Type the title of the additional development goal in the Title field in addition to a description, and then click on "Update".**

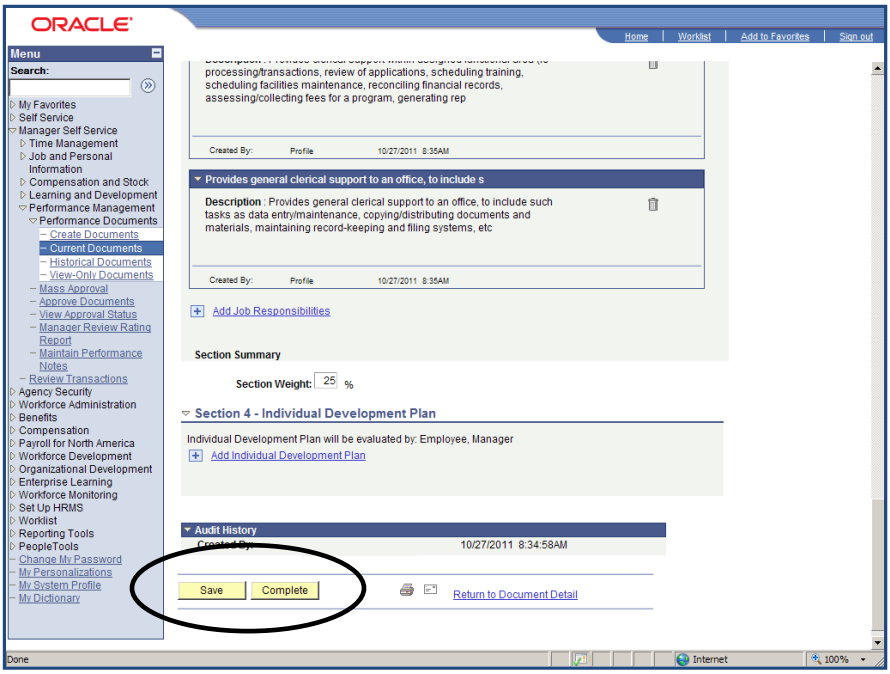
**Note:** You may spell check your description, by clicking on the spell check icon.




**Note:** The new added Individual Development Plan goal has been added to the document.

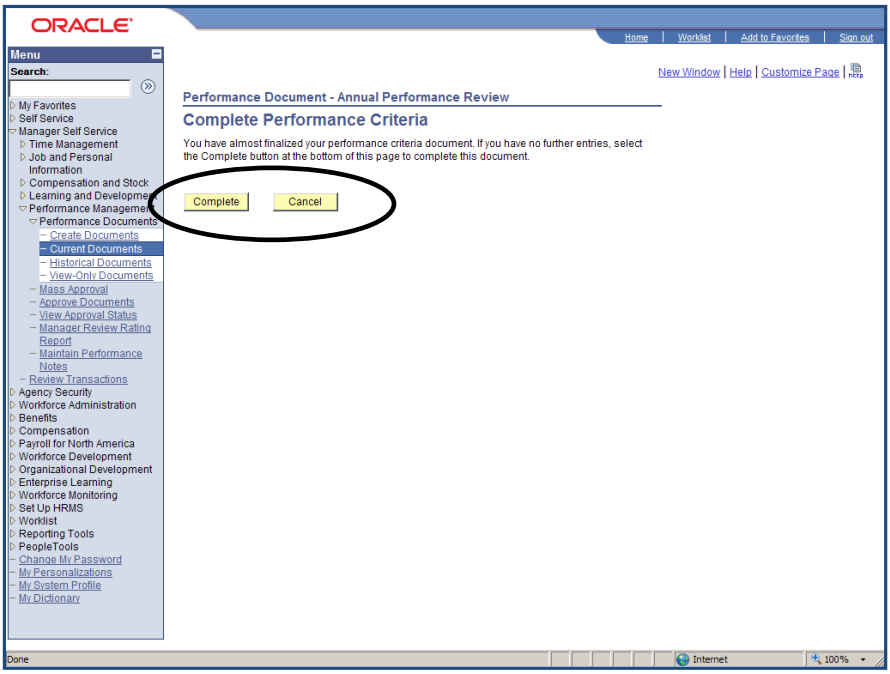
**Step 19: If additional information needs to be updated on the form click "Save" so that you are able to access the document at a later time to make additional changes/updates.**

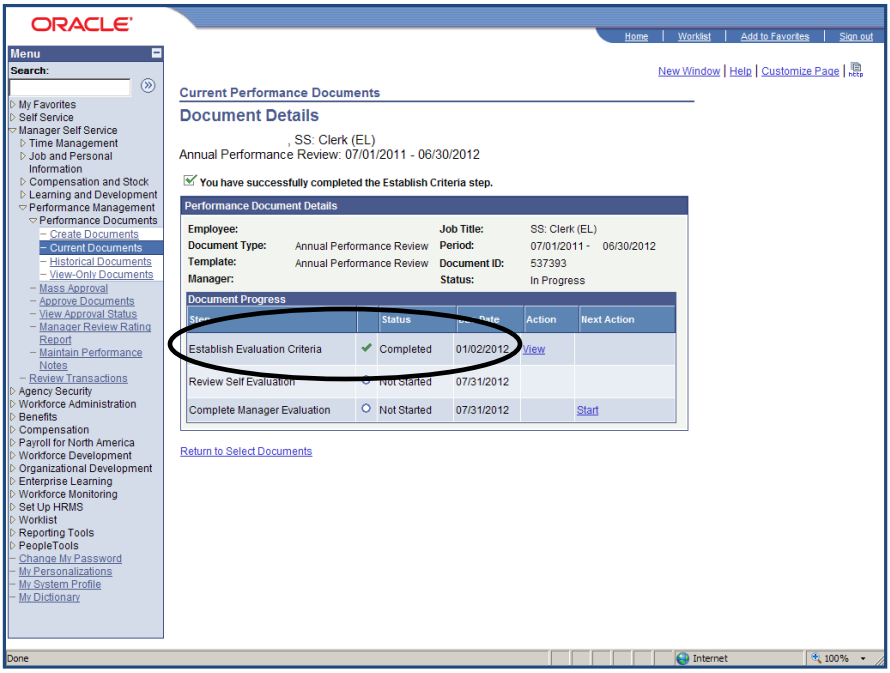
**If you are finished with the document, then click on "Save" and then click on "Complete".**




**Note:** Once the manager has completed this step, the system will send the employee an email to notify them that their plan is ready to view. The document becomes "view only" for the employee and manager.

**Step 20: Click "Cancel" to go back to the document or click "Complete" to finish the process.**






**Note:** The system will automatically return to the Document Details screen. Notice the Establish Evaluation Criteria step is **"Completed"**.