



## Job Performance Plans

### Preface

**Job Performance Plans** have been initiated by the agency Human Resources office, but the **Manager** (supervisor) is responsible for entering **Major Job Responsibilities** and their **Characteristics of Exceptional Performance**.

Managers must retain a hard copy of **Job Performance Plans** signed by the **Reviewer** for file purposes.

Managers should provide employees without computer access a paper copy of their **Job Performance Plan** at the time of discussion.

This is a three-tier process:

1. **Manager Modifies the Job Performance Plan**
2. **Manager Makes Job Plan Available, Marks Discussion Held**
3. **Manager Acknowledges and Completes Job Plan**

Note: This is a summary of the steps found in the Edison PE training and is offered as a supplemental tool. It is not a substitute for that training which is available on the Edison home page, path:

Edison Support Information > HCM > Human Resources > Reference Materials / Policy & Procedure

### 1. **Manager Modifies the Job Performance Plan**

Go to: Manager Self Service> Performance Management>Performance Documents> Current Documents

Listed are the current performance documents for the employees you supervise. To complete a **Job Performance Plan**:

Select **Job Plan** (Document Type) for an employee

Click **Start**

Click **Add Major Job Responsibility**

Click in the **Title** field and type: **Job Performance Plan**

Click **Update (you will now see the Comments Section)**

Now enter the **Major Job Responsibilities** and the **Characteristics of Exceptional Performance** for this employee in the comments section. You may “copy/paste” Job Plans from word documents.

**Caution:** Be sure to remove formatting of tabs prior to copying and pasting the content.

The Comments Section will hold up to 80 pages and will expand to view the information pasted by clicking **Available for Review**.

Click the **Spell Check** icon and make corrections if needed.

Click **OK**.

Click **Save**.

**The Job Performance Plan is ready for review.**

**Manager** presents a hard copy of the **Job Plan** to the **Reviewer** for agreement.

If the **Reviewer** has indicated that modifications are needed to the **Job Performance Plan**, the **Manager** must modify the document.

Once the **Reviewer** has initially **approved** the document, the **Manager** can discuss the **Job Performance Plan** with the employee.

For detailed information regarding Job Performance Plan construction, sign up for the on line PE training course available through DOHR. See your agency Training Coordinator.

## **2. Manager Makes Job Plan Available, Marks Discussion Held**

You received communication from the **Reviewer** that the **Job Performance Plan** is **approved**.

You have **discussed** the **Job Performance Plan** with the **Employee**.

Go to: Manager Self Service> Performance Management>Performance Documents> Current Documents

Click on **Job Plan** in the **Document Type** column.

Click the **Mark Available** link.

Click the **Available for Review** button. This will allow the **Employee** to view this **Job Performance Plan** using **Edison Self Service**.

Click **OK**

You are returned to the **Document Details** page.

Click **Mark Review Held**.

Click in the **Date of Discussion** field and enter the date you discussed the review with the employee.

Click **Review Held**

Click **OK**

The **Employee** can now navigate to the **Job Performance Plan** using **Edison Self Service** to **Acknowledge** the **Job Performance Plan**.

**Note:**

**Managers** must retain a hard copy of **Job Performance Plans** signed by the **Reviewer** for file purposes.

### 3. Manager Acknowledges (if necessary) and Completes Job Plan

Using **Edison Self Service** the **Employee** should **Acknowledge** the **Job Plan** if the discussion has taken place and Edison displays the correct **Date of Discussion**.


If the **Employee** is unable, fails or refuses to **Acknowledge** the **Job Plan** in a timely manner, the **Manager** is required to **Acknowledge** the **Job Plan** on behalf of the **Employee**.

Go to: Manager Self Service> Performance Management>  
Performance Documents> Current Documents

Click on **Job Plan** in the **Document Type** column. The link will be:

- **Acknowledge** if the **Employee** *has not* **Acknowledged** it.
- **Complete** if the **Employee** *has* **Acknowledged** the **Job Plan**.

Template Name: Annual Review

Document Progress		
Step	Status	Due Date
Complete Manager Evaluation	 Review Held	02/28/2009 <a href="#">View</a> <a href="#">Acknowledge</a>

*(This sample shows the employee did not acknowledge the evaluation.)*

- If the **Employee** *has not* **Acknowledged**, click **Acknowledge**.
- Click the **Acknowledge Review** button.

Note: Use **Manager Override** when the **Employee** is temporarily without computer access, thus unable to **Acknowledge** the **Job Plan**. The **Manager Acknowledges** on the Employee's behalf.

<input checked="" type="radio"/> <b>Manager Override</b>	<input type="radio"/> <b>Manager Override</b>
<input type="radio"/> <b>Employee Refused</b>	<input checked="" type="radio"/> <b>Employee Refused</b>

**Employee Refused** should be selected when the **Employee** fails or refuses to **Acknowledge** an evaluation in a timely manner.

**Important: The Employee Refusal option must not be selected without the prior approval of the Reviewer.**

- Click the appropriate button.
- Click **OK** to **Acknowledge** the **Job Plan**.

The **Complete** link is the last step in the **Job Plan** process.

Click on the **Complete** link.

Click the **Complete** button.

Click the **Complete** button.

Click **OK**