



Performance Management

Everything in One Place, For Each Cycle, For Each Employee

A Quick Reference Guide for the Enhanced Performance Management Process

For this year’s Performance Management Cycle, you will notice some improvements in the performance management process as it moves through the Edison system. These changes will make the process easier to track and complete.



Two major enhancements are:

- 1) All stages of the Performance Management Process will now be tracked through one form.
- 2) Only ratings of Unacceptable or Outstanding will need approval by the Agency Appointing Authority.

Helpful Navigations – By Role

The Rater (Supervisor):

Where do I go? - [Manager Self Service](#) > [Performance Management](#) > [Performance Documents](#) > [Current Documents](#)

The Performance Reviewer:

Where do I go?

To approve: [Manager Self Service](#) > [Performance Management](#) > [Approve Documents](#)

The Appointing Authority:

Where do I go? - [HCM](#) > [Workforce Development](#) > [Performance Management](#) > [Approve Documents](#)

The Employee:

Where do I go? - [Employee Self Service](#) > [Performance Management](#) > [My Performance Documents](#) > [Current Documents](#)

The Performance Process

*Figure A



In the new process, each procedural step above will be completed in one document. The Performance Document will go through an approval workflow at each step of the process (*See Figure B for this workflow, page2)

Detailed Process – The form in Edison

See Instructions at the top of the Edison form for a description of what to complete at each stage. (These instructions and screenshots can be found starting on page 3 of this Quick Reference Guide)

- *The review document contains the following sections:*

- 1** Strategic & Operational Goals (Agency)
- 2** Performance Planning, Observation and Feedback

The following steps will only be available on the Annual section of the review document.

- 3** End of Cycle Outcome Rating
- 4** Justification
- 5** Employee Comments

Important Buttons & Key Terms

AutoSave – The document you are working in will now Auto-save every 23 minutes. Upon Auto-saving, the cursor will move to the top of the page. Manually saving the document will continue to be available, by simply clicking the save button.

Manager Override – If an employee is unable to acknowledge their evaluation, the manager has the ability to override this process. If so, this will be noted on the evaluation's audit trail.

The Pencil (Edit) – The pencil icon indicates that the section you are working in is available for edit.



NOTE: Edison will provide email notifications when anyone involved in the PM process has a pending action/ approval. If you have trouble receiving any Edison email notifications, ensure that your email address is accurate on 'My System Profile' and check your spam folder settings.



Approval Process – For Each Procedural Step

The Approval Workflow process will initiate at the Submission of each procedural stage. On the Annual Review phase, an additional approval by the Appointing Authority will be required for ratings of Unacceptable & Outstanding.

*Figure B



Work Outcome Statements & Goals – Sections 1 & 2



Tie Your Work Outcome Statements in Section 2 to the Pre-Defined Agency Goals in Section 1.

(See page 5 for screenshot)

Getting Started – The Rater - (Supervisor)

Current Performance Documents

Document Details

Annual: 11/01/2013 - 09/30/2014

Performance Document Details				
Employee:		Job Title:	NUTRITIONIST 2	
Document Type:	Annual	Period:	11/01/2013 - 09/30/2014	
Template:	Annual Performance Review	Document ID:	735365	
Rater:		Status:	In Progress	

Document Progress				
Step	Status	Due Date	Action	Next Action
Complete Manager Evaluation	 Not Started	09/30/2014		

[Return to Select Documents](#)

As a Rater, you will follow the Navigation listed on Page 1 and below of this training document to initiate the Performance Management Process:

Where do I go? - Manager Self Service > Performance Management > Performance Documents > Current Documents

To initiate the document, please hit the Start Button. This button will allow you to open the document to move through the process. The button will indicate the stage of the process you are ready to complete. These stages, in order, are Start, Mark Available, Review Held, and Acknowledge. Submit will move to the next step of the PM process.

View Documents (In-Progress at Go-Live)

Documents that are in-progress, but have NOT been submitted for approval at Go-Live (11/1/2013), will follow the post-Go-Live approval workflow (see workflow diagram at the end of this document). Documents that are in-progress and have been submitted for approval at Go-Live (11/1/2013), will follow the pre-Go-Live approval workflow.

Where do I go? - Manager Self Service > Performance Management > Performance Documents > Current Documents

The Instructions

****At the top of your Performance Management document, you will notice a series of instructions. These instructions will take you through the full Performance Management process. These instructions are Read Only. We have included these instructions below for your convenience.**

Save entries made on the review by selecting the Save button. Please verify, prior to submit, all step(s) have been completed (see below instructions). To submit review for approval, select the Submit for Approval button.

Individual Performance Plan:

1. Enter Agency Strategic & Operational Goals in Section 1 - Strategic & Operational Goals.
2. Enter Work Outcome Statements and Action Steps in Section 2 - Performance Planning, Observation & Feedback. Up to six Work Outcome Statements can be entered.

Interim 1 and Interim 2:

Enter Interim 1 or Interim 2 Comments in Section 2 - Performance Planning, Observation & Feedback.

Annual:

1. Select End of Cycle Outcome Rating and enter Outcome Rating Justification in Section 2 - Performance Planning, Observation & Feedback for each Work Outcome Statement.
2. Select Overall Performance Rating in Section 3 - Overall Performance Rating. This is a required field.
3. Enter comments in Section 4 - Rater Overall Rating Justification. This is a required field.

Once the review has been approved, mark the document Available for Review to allow the employee to view this document. You should now contact your employee to schedule a meeting to discuss performance expectations.

Section 1 & 2: Strategic & Operational Goals/ Performance Planning, Observation & Feedback

[Expand All](#)

[Collapse All](#)

[Expand Sections](#)

Section 1 - Strategic & Operational Goals

[Expand](#)

[Collapse](#)

Goal 1: JOBS AND ECONOMIC DEVELOPMENT

Description : Be the #1 state in the Southeast for High Quality Jobs!

Created By: Template 09/12/2013 10:32AM

[+ Add Agency Strategic & Operational Goal](#)

Section 2 - Performance Planning, Observation & Feedback

[Expand](#)

[Collapse](#)

Work Outcome Statement 1

Work Outcome Statement : By June 30, 2014, secure a minimum of three new customer groups and four expanded business projects from current customers for a minimum of \$150,000 revenue.

Action Steps : 1) Submit an "existing business" report to the Director the first week of each month representing the previous month's business.

Interim 1

Interim 2



HELPFUL HINT:

The [Expand All](#) button can be used to open all the fields under all sections.

The Pencil:

The Pencil Icon will appear when each section is available to be completed. Click to EDIT your statements.

Work Outcome Statements

The Edison Performance Management form will allow for up to 6 Work Outcome Statements.

For Example, if you have 4 Work Outcome Statements, you will leave 2 outcome statements blank.

Sections 3 – 5 - Finalizing Your Performance Review (Annual)

As you Move into the Annual phase of your Performance Management document, you will notice that Sections 3-5 appear on the Edison Performance Review document. These sections are as follows:

Section 3 – Overall Performance Rating

- Utilize the dropdown on this section to enter which of the 5 rating levels you are assigning this employee. Performance levels are as follows: **Unacceptable, Marginal, Valued, Advanced, and Outstanding**. Please reference DOHR Performance Management training materials to assist on how to select which rating to use.

Section 3 - Overall Performance Rating

Rating



Use this Icon to select which of the 5 overall Ratings your employee will receive.

Section 4 – Rater Overall Rating Justification

- In this field, you will enter your justification for the rating given in section 3. This will be helpful (particularly for ratings of Unacceptable or Outstanding) to the reviewer/ appointing authority as they approve/ deny this document.

Section 4 - Rater Overall Rating Justification

Comments:

Overall Rating Justification will be entered here.

Section 5 – Employee End of Cycle Comments

- Employees will have an opportunity to respond to their rating before the document is finalized. Their response will be recorded in this section.

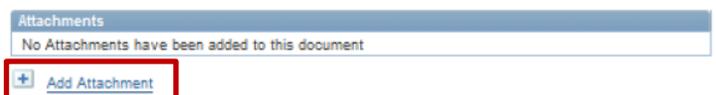
Section 5 - Employee End of Cycle Comments

Comments:

Employee End of Cycle Comments will be entered here.

Attachments

The Performance Document has an Attachment section that will allow you to add documents required to support the Evaluation process. Click [Add Attachment](#) to select a document from your files to attach.



The Audit – NEW FEATURE

One New Feature that is offered in the Performance Management form in Edison is the ability to see an audit trail of the Performance Management Process. This Audit History includes automatically calculated due dates (see blue boxes), and each individual step of the approval process. Once approval takes place, the system will show the name and date/time stamp tied to that particular transaction. This is a very helpful section to use in order to track what stage of the document you are currently on, or who completed a specific stage of the process.

Audit History

Individual Performance Plan **Due Date 12/01/13**

- Submit for Approval
- Approved by Reviewer
- Available for Review
- Review Held
- Aoknowledged

Interim 1 **Due Date 03/31/14**

- Submit for Approval
- Approved by Reviewer
- Available for Review
- Review Held
- Aoknowledged

Interim 2 **Due Date 06/30/14**

- Submit for Approval
- Approved by Reviewer
- Available for Review
- Review Held
- Aoknowledged

Annual **Due Date 09/30/14**

- Submit for Approval
- Approved by Reviewer
- Approved by Appt Authority
- Available for Review
- Review Held
- Aoknowledged
- Complete

