Guide To
Performance Management

MyPURPOSE

Grow. Learn. Lead. Serve.

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Core Competencies for Employees

Competencies are observable and identifiable skills, knowledge, abilities demonstrated as behaviors that directly impact performance of an employee. Competencies help supervisors evaluate “how” an employee achieves their performance goals and performs their job.

Competencies will have an optional comment box available to list agency specific information. Competencies do not require a task. Competencies are equally weighted and total 100%, the competency section is 50% of the overall rating at the year-end evaluation.

Competency	**Description**
Customer Service	Honors the organization's commitments to customers by providing helpful, courteous, accessible, responsive, and knowledgeable service and information to external and internal customers.
Teamwork and Cooperation	Cooperates with others to accomplish common goals. Works with employees within and across his/her department to achieve shared goals. Treats others with dignity and respect and maintains a friendly demeanor. Values the contributions of others.
Accountability	Accepts full responsibility for self and contribution as a team member. Displays a strong commitment to organizational success. Demonstrates a commitment to delivering on his/her duties and responsibilities. Requests and uses leave in accordance with policies and procedures. Notifies supervisor directly if an unscheduled absence is necessary. Arrives at and leaves workstation per approved schedule. Observes rules concerning work schedules, breaks, and lunch periods.
Adaptability	Demonstrates ability to adjust readily to different conditions. Adjusts to change and different ways of doing things quickly and positively. Does not shy away from addressing setbacks or concerns. Deals effectively with a variety of people and situations. Appropriately modifies thinking or approach as the situation changes.
Communication	Respectfully listens to others to gain a full understanding of issues. Presents information in a clear and concise manner, orally and in writing, to ensure others understand his/her ideas. Appropriately adapts his/her message, style, and tone to accommodate a variety of audiences.
Professional Development	Demonstrates a commitment to professional development by proactively seeking opportunities to develop new capabilities, skills, and knowledge. Acquires the skills needed to continually enhance his/her contribution to the organization and to his/her respective profession.

Leadership Competencies for Supervisors

Competency	Description
Team Leadership	Effectively manages and guides group efforts. Tracks team progress, adequately anticipates issues, and adjusts as needed to achieve team goals. Provides appropriate feedback concerning group and individual performance, including areas for improvement.
Change Management	Identifies, plans, implements, and supports changes that are aligned with the organization's vision and values. Develops innovative approaches to address problems. Leads continuous improvement in programs and processes. Leads effective and smooth change initiatives. Is a visible role model for others.
Talent Management	Clearly establishes and communicates expectations and accountabilities. Monitors and evaluates performance. Completes required performance evaluation system trainings, meetings, and documentation. Provides effective feedback and coaching. Identifies development needs and helps employees achieve optimal performance and gain valuable skills that will translate into strong performance.

Goals

Goal Management is the process of creating and aligning individual performance goals to the organization's strategic objectives. Effective goal management ensures employees understand how their work contributes to the success of the Commonwealth. Performance goals help managers evaluate "what" the employee accomplished as part of the annual performance review.

Goals should be individually weighted and equal 100%, the goal section is 50% of the overall rating at the year end evaluation.

Rating Scale

The overall score is calculated on a 50-50 split. Competencies will be equally weighted totaling 100%, this is done automatically in the system. Goals will use there defines weights also equaling 100%, each section is worth 50% so the final overall score is an average of the two section ratings.

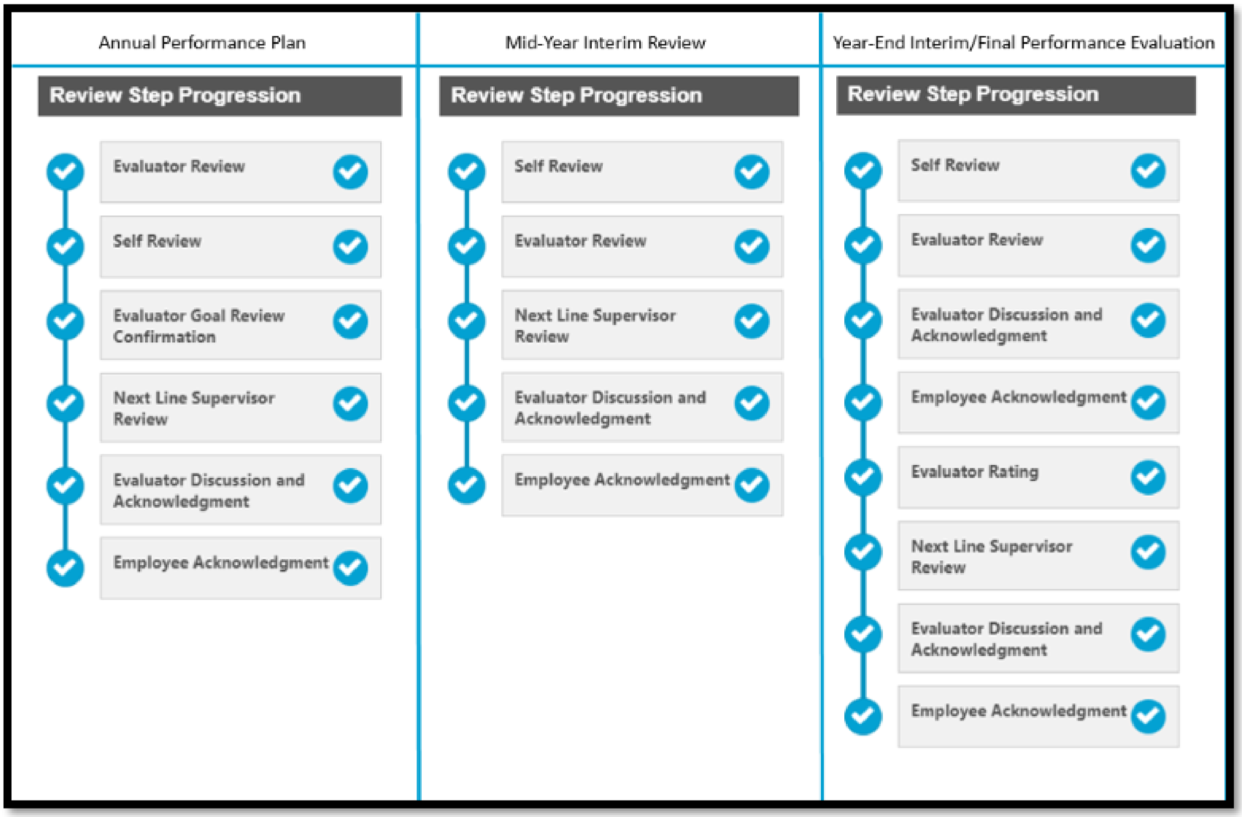
The Year-End Interim/Final Performance Evaluation will be based on the following criteria.

Rating	Description
Unacceptable Performance	Employee rarely achieves expected performance and does not meet all or most of the performance expectations. Employee needs to improve performance significantly of job tasks or competencies.
Needs Improvement Performance	Employee inconsistently achieves expected performance and does not meet some performance expectations. Employee needs to improve performance of job tasks or competencies.
Satisfactory Performance	Employee meets performance expectations. Employee is a consistent contributor to the success of the organization.
Valued Performance	Employee exceeds some performance expectations. Employee is well regarded by peers and stakeholders.
Distinguished Performance	Employee often exceeds most performance expectations. Goals and tasks are accomplished above the required standards. Employee demonstrates a desire and ability to excel.
Exceptional Performance	Employee consistently exceeds all performance expectations. Performance represents an extraordinary level of achievement and commitment. Employee demonstrates role model behaviors.

Tasks Step Progression

Below is a visual of the step progression each performance review follows. Employees now have two steps in the performance review process. Self Review steps are optional and intended to allow employees the opportunity to provide feedback on goals created by their evaluator.

Each step has an associated due date, to help keep the task with in compliance, however required steps will remain visible until action is taken. Step due dates are different from the overall compliance date. Below is a view of the workflow for each performance phase.

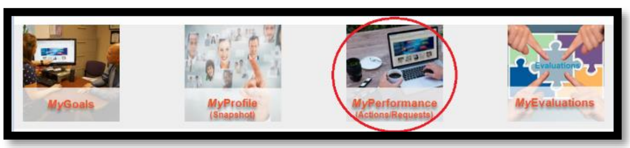


Evaluator Annual Performance Planning

Evaluator Review:
*Note that the Evaluator Review step has a due date ten (10) days after the task is launched. Due dates are intended to keep the task on track to meet the compliance date of January 31st. The Evaluator Review step is a required step and will not advance until completed. E-mail notification will be sent to the evaluator once the task is launched and after ten (10) days when then the task becomes past due.

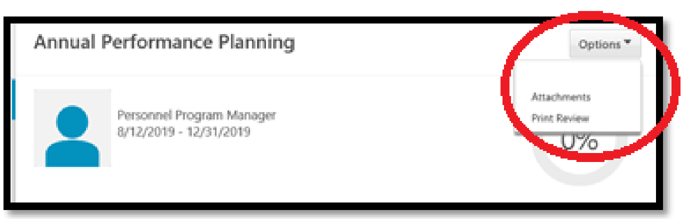
1. From the MyPURPOSE home screen, select the Performance tile.

2. Select MyPerformance (Actions/Request).



3. You will have a separate task for each employee who is eligible for a performance plan and reports to you. Select **Launch** next to one of your Annual Performance Planning task. If you have several employees that report to you select the **Performance** tab then **Scheduled Tasks** to see all tasks.
   - If you do not have a task for a performance eligible employee, please have your Performance Management Administrator submit a business request with the employees name and User ID.
   - If you have a task for an employee that does not report to you contact you Performance Management Administrator.

4. On the right hand side of your screen, you will notice a dropdown labeled **Options**. Use this to add an attachment to the Performance Plan if desired.



5. Each task will start with an overview, please read the Annual Performance Planning overview carefully and select **Get Started.**
6. **<u>Competency Section</u>**- Review the instructions for the Annual Performance Planning and scroll down to review the core competencies. You will notice for each competency you have the option to include comments for further explanation. Tasks are not associated with competencies.

   For example, under Professional Development you may add a comment that says, "Employee is expected to complete 06 hours of training per year".

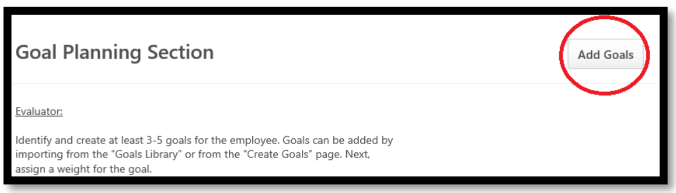
   - If an employee has the wrong competencies listed please contact your Performance Administrator.

   Competencies are equally weighted totaling 100%, this is done automatically in the system you will not assign percentages to them.

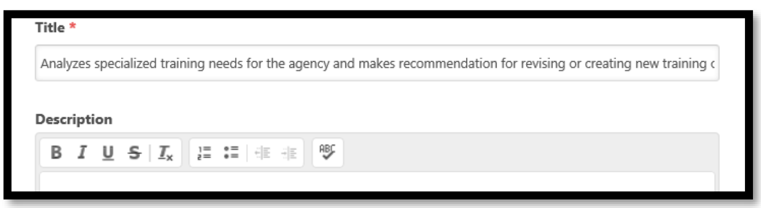
   *See the Core Competencies section for more information regarding competencies.

7. After you have reviewed all competencies and added any necessary comments, select **Save and Continue**.
8. **<u>Goal Planning Section</u>**- Review the instructions for the evaluator.

   a. On the right hand side of your screen, select **Add Goals** to add 3-5 goals. Use one of the two methods listed below to add the employee's goals.

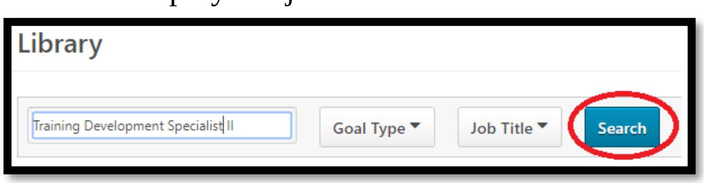


1. You can *manually* enter the goals by entering a goal into the title field. The description field is available to further define the goal, this is not required. OR see below on how to utilize the goals library.

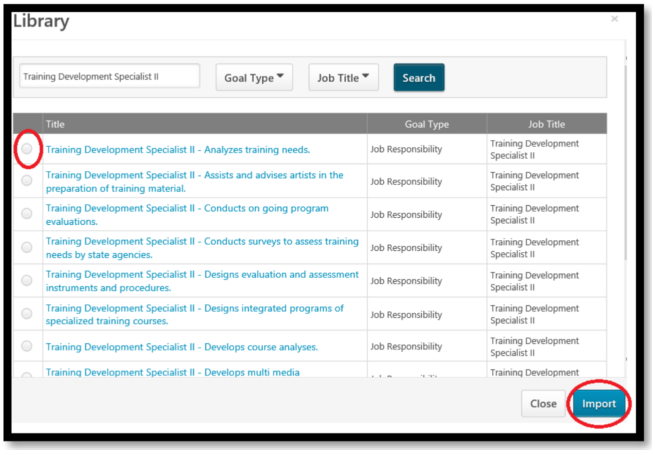


2. For your convenience, we have created a goals library with a list of possible goals for all job titles. To utilize this feature, select **Library** located on the right hand side of your screen.

-Enter the employee's job title and select **Search**.



- Select the radio button next to a goal you wish to add, select **Import**.



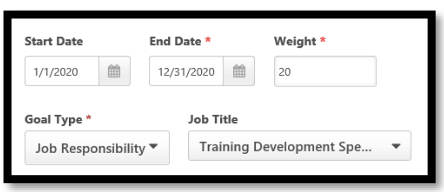
- Once imported, please remove the position title from the goal title.
-You may also update or add to the imported goal title and/or description.

*Note:
Only one goal can be imported at a time.
Ensure you are selecting goals with a title that corresponds with the employee's job title.
Other duties as assigned is not a goal, this can be used as a task within a goal.

b. Verify each goal has a start and end date that matches the review period. For example, 01/01/2020 12/31/2020

c. **Weight each goal**. The system will accept any percentage you enter, all goals should equal 100%.

d. If you used the goals library, the goal type will default to Job Responsibility. If you entered the goal manually, use the drop down and select Job Responsibility.

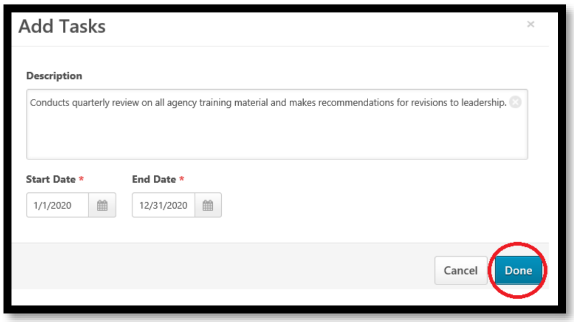


e. If you use the goals library, the job title will default with the correct job title. If you entered the goal manually, you can use the drop down and select the correct job title. This is not required.

f. Each goal must have at least one task, you can add multiple tasks to a goal if applicable. Select **Add Tasks** and enter the task description, this should follow the SMART criteria and further define your goal.

*SMART: Specific, Measurable, Achievable, Realistic, Timely

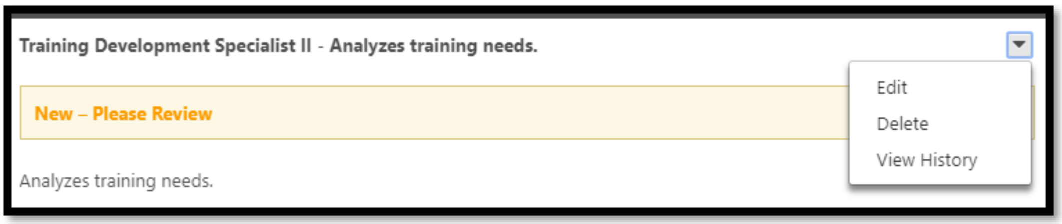
g. Verify that your task start and end dates match the review period and then select **Done**. For example, 01/01/2020 – 12/31/2020



*Repeat steps a-g until all goals and tasks have been added

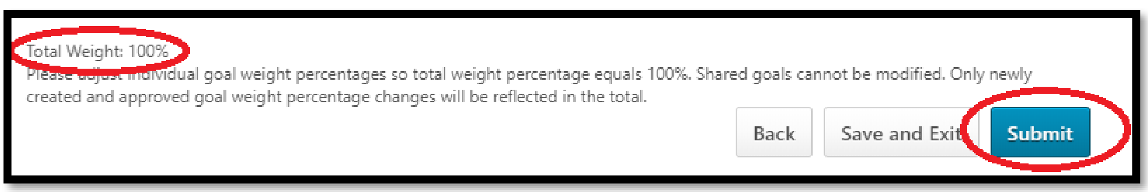
h. From the Create goals page, review your goals and tasks and select **Save**.

i. From the goals page, you will see a yellow banner identifying all new goals. If you need to edit or delete a goal before submitting, use the drop down to view options for each goal.



9. Once the Goal Planning section has been completed with all goals and tasks, select **Submit**. You will receive a second submit notice, select **Submit**. This will automatically follow step progression and advance the plan to the employee for the optional Self Review.

   * Note that total goal weight must reflect 100%, if not, you need to adjust your goal percentages before submitting. You can view the total weight at the bottom of the goals page.

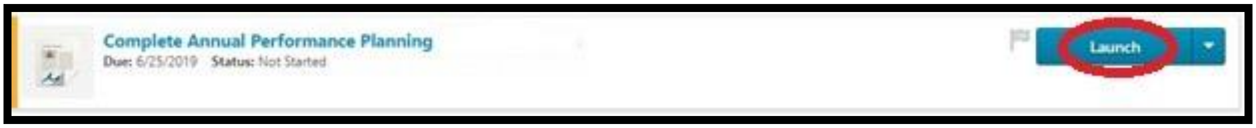


   *After you have completed the Evaluator Review step you can use the Step Status report to track where a task is in workflow. For more detailed report instructions, please visit the Personnel Cabinet Performance Management website.

Evaluator Goal Review Confirmation:

*Note that the Evaluator Review Confirmation step has a due date three (3) days after receiving. Due dates are intended to keep the task on track to meet the compliance date of January 31st. The Evaluator Review Conformation step is a required step and will not advance until completed. E-mail notification will be sent to the evaluator once the task is assigned and after three (3) days when then the task becomes past due

1. Once optional employee Self Review is completed, the task will automatically follow step progression and return to your Action items in MyPURPOSE, select **Launch.**

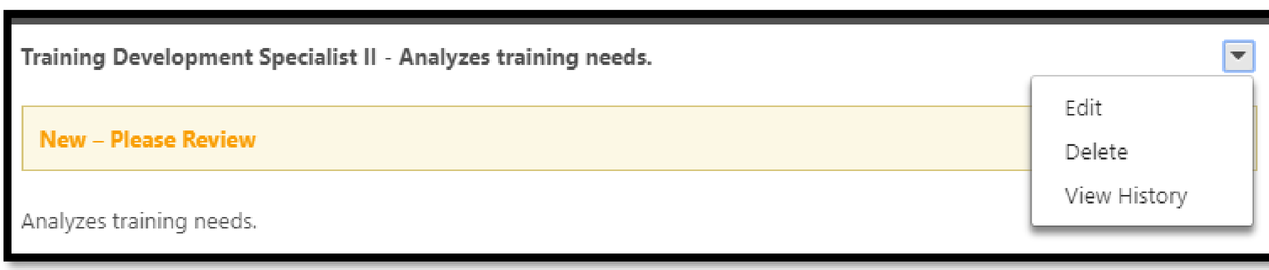


2. Each task will start with an overview, please read the Annual Performance Planning overview carefully and select **Get Started**.
   *You will notice beside Get Started you have a **Reopen Step** option. Use this if you need to return the task to the employee for Self Review. If you utilize the reopen feature please close task, do not submit. When a task is reopened the task will show in your worklist and in the employees at the same time. It is imperative that you communicate outside the system with the employee when the task is reopened.

3. **Competency Section**- Review the instruction for the Annual Performance Planning and scroll down to review the core competencies. This section is read only, review and select **next.** Should you need to edit a competency during this step, reach out to your Performance Management Administrator.

4. **Goal Planning Section**- Review the instructions for the evaluator. This section is intended for you to review any feedback the employee provided during the Self Review.

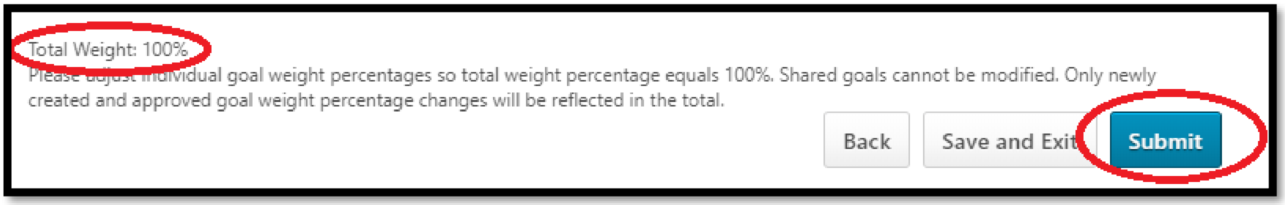
   a. Based on employee feedback, you can adjust goals/tasks by selecting the drop down on the right hand side of each goal and choose edit or delete.



   b. The comment box provided is optional and intended for you to respond to any feedback left by the employee.

c. Once all goals/tasks have been reviewed, select **Submit**. Your task will automatically follow step progression and advance to the next line supervisor for review.

- Note that total weight **MUST** reflect 100%, if not you need to adjust your goal percentages before submitting. The system will allow you to submit any percentage that is entered.



<u>Evaluator Discussion and Acknowledgment:</u>

*Note that the Evaluator Discussion and Acknowledgment step has a due date five (5) days after the task is launched. Due dates are intended to keep the task on track to meet the compliance date of January 31st. The Evaluator Discussion and Acknowledgement step is a required step and will not advance until completed. E-mail notification will be sent to the evaluator once the task is assigned and after five (5) days when then the task becomes past due.

1. Once the next line supervisor has completed their review, the task will automatically follow step progression and return to your action items in MyPURPOSE, select **Launch.** This step is intended for the evaluator to meet and discuss the plan with the employee in a face-to-face meeting.

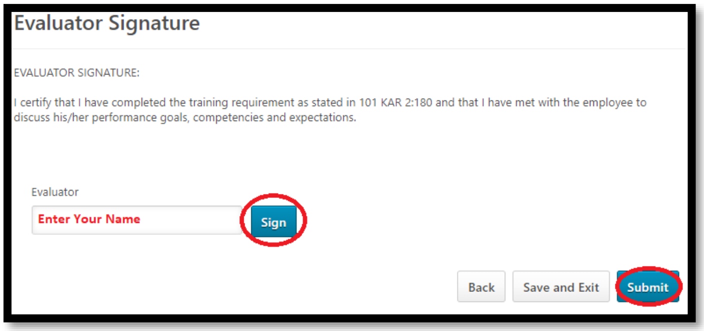
2. Each task will start with an overview, please read the Annual Performance Planning overview carefully and select **Get Started**.

3. **<u>Competency Section</u>**- Review the instructions for the Annual Performance Planning and scroll down to review the core competencies. Here you will be able to review all comments left by the employee and yourself. This section is read only, select **Next**.

4. **<u>Goal Planning Section-</u>** Review the instructions for the evaluator. Scroll down to review the goals and all comments left by the employee and yourself. This section is read only, select **Next**.

   If there is a need for edits during this step, reach out to your Performance Management Administrator.

5. **<u>Evaluator Signature Section</u>**- To certify that you have completed all requirements and have met with your employee, enter your name and select **Sign** then select **Submit.** This will automatically follow step progression and advance the plan to the employee for acknowledgment.



* After the employee has complete the acknowledgement step you can view their completed Performance Plan from the performance home page, select the MyEvaluations tab, then select the box next to *Show completed and expired task*. This will list steps and performance reviews you have completed for your employees. You can view the performance review here in a read only view.

Evaluator Mid-Year Interim Review

<u>Evaluator Review:</u>

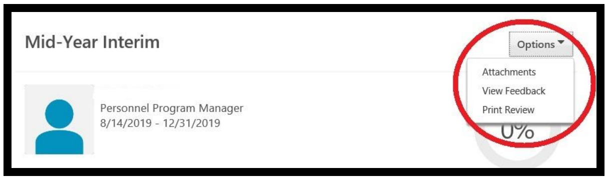
*Note that the first step in the Mid-Year Interim Review is the optional employee Self Review. The employee has five (5) days to complete before it automatically workflows to the evaluator.
The Evaluator Review step has a due date ten (10) days after the task is assigned. Due dates are intended to keep the task on track to meet the compliance date of July 31st. The Evaluator Review step is a required step and will not advance until completed. E-mail notifications will be sent to the evaluator once the task is launched and after ten (10) days when then the task becomes past due.

1. From the MyPURPOSE Home screen, select the Performance Tile.

2. Select MyPerformance (Actions/Requests).

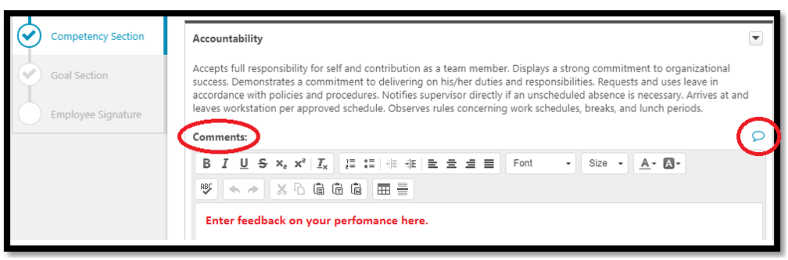
3. You will have a separate task for each employee who is eligible for a Mid-Year Interim Review and reports to you. Select **Launch** next to one of your Mid-Year tasks.
   - If you do not have a task for a performance eligible employee, please have your Performance Management Administrator submit a business request with the employees name and User ID.
   - If you have a task for an employee that does not report to you contact you Performance Management Administrator.

4. On the right hand side of your screen, you will notice a dropdown labeled **Options.** Use this to view or add attachments to the Mid-Year Interim Review if desired.



5. Each task will start with an overview, please read the Mid-Year Interim Review overview carefully and select **Get Started**.
   *You will notice beside Get Started you have a **Reopen Step** option. Use this if you need to return the task to the employee for elf -review. If you utilize the reopen feature please close task, do not submit. When a task is reopened the task will show in your worklist and in the employees at the same time. It is imperative that you communicate outside the system with the employee when the task is reopened.

6. <u>Competency Section</u>- Review the instructions for the Mid-Year Interim Review and scroll down to review the core competencies. You will be able to review any comments left by the employee during their Self Review.
   a. Comments are required from you, the evaluator, on all competencies listed.
   b. To the right of the comments box, we have included suggested comments for your convenience. To utilize this feature select the icon and select the comment you wish to utilize. You should then make this comment specific to the employee and add additional supportive detail.



7. After you have reviewed and commented on each competency, select **Save and Continue**.

8. **<u>Goal Section-</u>** Review the instructions for the evaluator and scroll down to view any comments left by the employee during their Self Review.
    a. Comments are required from you, the evaluator, on all goals listed.
    b. Once all goals have been commented on, select **Submit**. The task will automatically follow step progression and advance to the next line Supervisor Review step.

Evaluator Discussion and Acknowledgment:

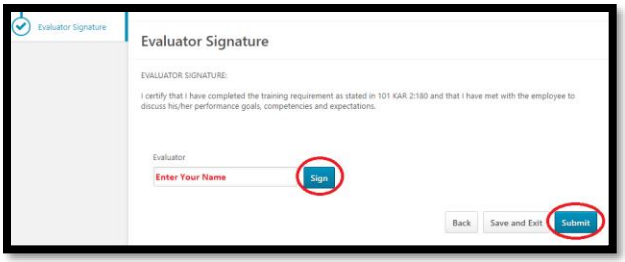
*Note that the Evaluator Discussion and Acknowledgement step has a due date five (5) days after the task is launched. Due dates are intended to keep the task on track to meet the compliance date of July 31st. The Evaluator Discussion and Acknowledgment step is a required step and will not advance until completed. E-mail notification will be sent to the evaluator once the task is launched and after five (5) days when then the task becomes past due.

1. Once the next line supervisor has completed their review, the task will return to your action items in MyPURPOSE, select **Launch.** This step is intended for the manager to meet and discuss the Mid-Year Interim Review with the employee in a face-to-face meeting.

2. Each task will start with an overview, please read the Mid-Year Interim Review overview carefully and select **Get Started**.
*You will notice beside Get Started you have a **Reopen Step** option. Use this if you need to return the task to the next line supervisor or to the employee for Self Review. If you utilize the reopen feature please close the task, do not submit. When a task is reopened the task will show in your worklist and in the next lines or employees worklist at the same time. It is imperative that you communicate outside the system with the employee or next line when the task is reopened.

3. **<u>Competency Section</u>**- Review the instructions for the Mid-Year Interim and scroll down to review the core competencies. This section is read only, comments from the employee and yourself are visible. Select **Next**.
4. **<u>Goal Section-</u>** Review the instructions for the evaluator and scroll down to review the goals. This section is read only, comments from the employee and yourself are visible. Select **Next**.
If you need to edit during this step, reach out to your Performance Management Administrator**.**

5. **Evaluator Signature Section**- To certify that you have completed all requirements and have met with your employee, enter your name and select **Sign** then select **Submit.** This will automatically follow step progression and advances the Mid-Year Interim Review to the employee for acknowledgment.



* After the employee has complete the acknowledgement step you can view their completed Mid-Year Interim Review from the performance home page, select the MyEvaluations tab, then select the box next to *Show completed and expired task.* This will list steps and performance reviews you have completed for your employees. You can view the performance review here in a read only view.

Evaluator Year-End Interim/Final Performance Evaluation

Evaluator Review for Year-End Interim Review:

*Note that the first step in the Year-End Interim is the optional employee Self Review. The employee has five (5) days to complete before it automatically workflows to the evaluator.

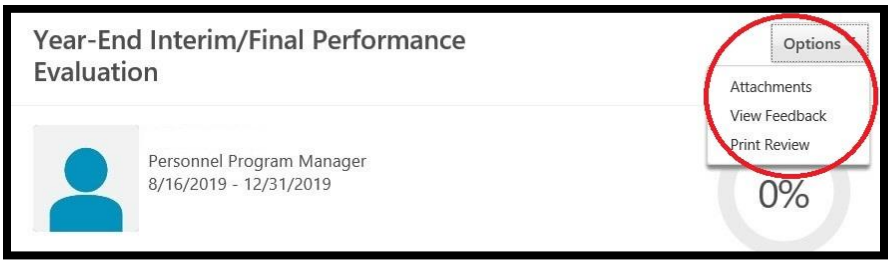
The Evaluator Review step has a due date five (5) days after the task is assigned. Due dates are intended to keep the task on track to meet the compliance date of January 31st. The Evaluator Review step is a required step and will not advance until completed. E-mail notifications will be sent to the evaluator once the task is assigned and after five (5) days when then the task becomes past due.

1. From the MyPURPOSE Home screen, select the Performance Tile.

2. Select MyPerformance (Actions/Requests).

3. Select **Launch** next the employee's Year-End Interim/Final Performance Evaluation, you will have separate task for each employee.
    - If you do not have a task for a performance eligible employee, please have your Performance Management Administrator submit a business request with the employees name and User ID.
    - If you have a task for an employee that does not report to you contact you Performance Management Administrator.
4. 

5. On the right hand side of your screen, you will notice a dropdown labeled **Options**. Use this to view or add attachment to the Year End Interim Review if desired.



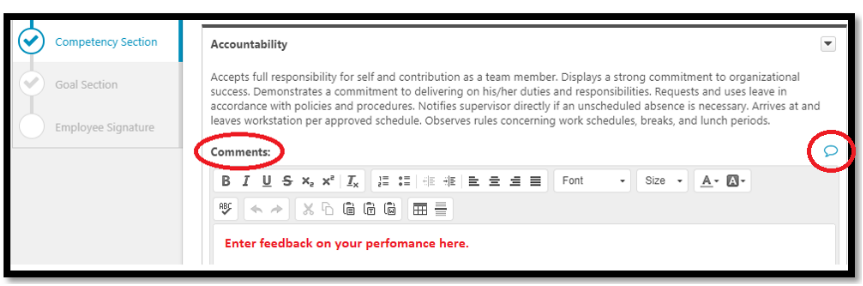
6. Each task will start with an overview, please read the Year-End Interim/Final Performance Evaluation overview carefully and select **Get Started.**

*You will notice beside Get Started you have a **Reopen Step** option. Use this if you need to return the task to the employee for Self Review. If you utilize the reopen feature please close task, do not submit. When a task is reopened the task will show in your worklist and in the employees at the same time. It is imperative that you communicate outside the system with the employee when the task is reopened.

7. **<u>Competency Section</u>**- Review the instruction for the Year End Interim and scroll down to review the core competencies. You will be able to review any comments left by the employee during their optional Self Review.

    a. Comments are required from you, the evaluator, on all competencies listed.

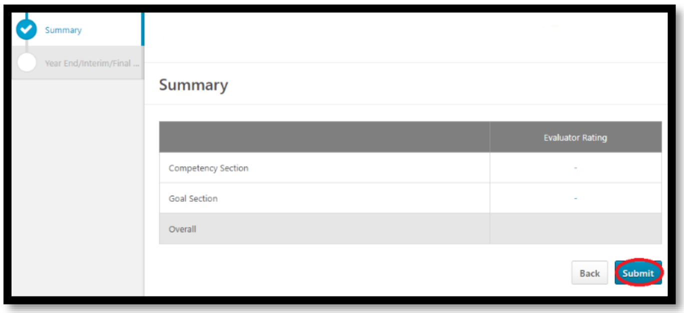
    b. To the right of the comments box, we have included suggested comments for your convenience. To utilize this feature select the icon and select the comment you wish to utilize. You should then make this comment specific to the employee and add additional supportive detail.



8. After you have reviewed and commented on each competency, select **Save and Continue**.

9. **Goal Section-** Review the instructions for the evaluator and scroll down to view any comments left by the employee during their optional Self Review.
    a. Comments are required from you, the evaluator, on all goals listed.
10. After you have commented on each goal, select **Save and Continue**.

    *Be mindful to select **Save and Continue** and not blue **Submit** option. Submit will automatically advance the task to the employee.
11. **Summary section**- This screen is blank as there are no ratings associated with the Year-End Interim Review, select **Submit.** The task will automatically follow step progression and the Year-End Interim Review will route back to you for discussion and acknowledgment with the employee.



Evaluator Discussion and Acknowledgment for Year-End Interim Review:

*Note that the Evaluator Review step has a due date four (4) days after the task is launched. Due dates are intended to keep the task on track to meet the compliance date of January 31st. The Evaluator Discussion and Acknowledgment step is a required step and will not advance until completed. E-mail notification will be sent to the evaluator once the task is launched and after four (4) days when then the task becomes past due.

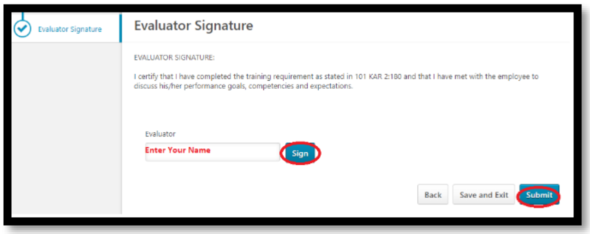
1. Once the Year-End Interim has been reviewed and the employee and you have commented on both the competencies and goals, the task will return to your Action items in MyPURPOSE, select **Launch**. This step is intended for the evaluator to meet and discuss the Year End Interim with the employee in a face-to-face meeting.
2. Each task will start with an overview, please read the Year-End Interim overview carefully and select **Get Started**.

    *You will notice beside Get Started you have a **Reopen Step** option. Use this if you need to return the task to the employee for Self Review. If you utilize the reopen feature please close task, do not submit. When a task is reopened the task will show in your worklist and in the employees at the same time. It is imperative that you communicate outside the system with the employee when the task is reopened.
3. **Competency Section**-Review the instructions for the Year-End Interim and scroll down to review the core competencies. Here you will be able to review all comments left by the employee and yourself. This section is read only, select **Next**.
4. **Goal Section**- Review the instruction for the evaluator and scroll down to review the goals. Here you will be able to review all comments left by the employee and yourself. This section is read only, select **Next**.

5. **Summary Section**- This screen is blank as there are no ratings associated with the Year-End Interim, select **Next.**

   If you need to make an edit during this step, reach out to your Performance Management Administrator.

6. **Evaluator Signature Section**- To certify that you have completed all requirements and have met with your employee, enter your name and select **Sign** then select **Submit.** This will automatically follow step progression and advance the Year-End Interim to the employee for acknowledgment.



   This is the final step for the evaluator for the Year-End Interim Review

Evaluator Rating for Final Performance Evaluation:

*Note that once the Year-End Interim Review is completed the task will automatically be assigned back to you for rating. The Evaluator Review step has a due date three (3) days after the task is assigned. Due dates are intended to keep the task on track to meet the compliance date of January 31st. The Evaluator Review step is a required step and will not advance until completed. E-mail notification will be sent to the evaluator once the task is launched and after three (3) days when then the task becomes past due.

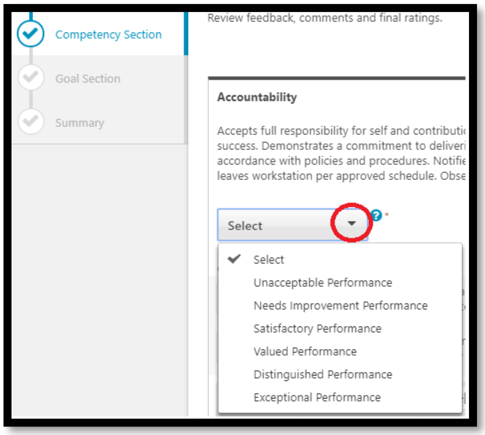
1. Select **Launch** next the employee's Year-End Interim/Final Performance Evaluation, you will have separate task for each employee.

2. Each task will start with an overview, please read the Year-End Interim/Final Performance Evaluation overview carefully and select **Get Started.**

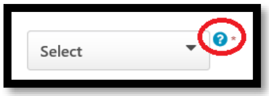
*You will notice beside Get Started you have a **Reopen Step** option. Use this if you need to return the task to the employee for Self Review. If you utilize the reopen feature please close task, do not submit. When a task is reopened the task will show in your worklist and in the employees at the same time. It is imperative that you communicate outside the system with the employee when the task is reopened.

3. **Evaluator Signature Section**- This screen is simply to show that the Year-End Interim has been completed, select **Save and Continue.**

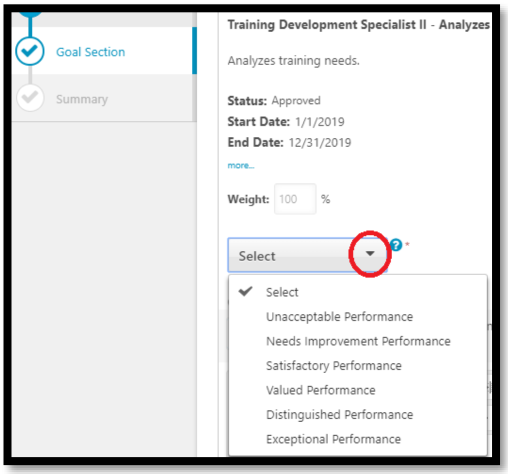
4. **Competency Section**- Review the instructions for the Final Performance Evaluation and scroll down to review the core competencies.
   a. Below each competency listed, you will see and dropdown labeled **Select.** Use the dropdown to select a rating for each competency.



   b. You can select the help icon to the right of the dropdown to display a description of all ratings. DO NOT edit or add Year-End Interim Review Comments, only apply rating.



5. After you have selected a rating for each competency, select **Save and Continue**.
6. **Goal Section**- Review the instructions for the Final Performance Evaluation and scroll down to review all goals and tasks.
   a. Below each goal listed, you will see and dropdown labeled **Select.** Use the dropdown to select a rating for each goal.

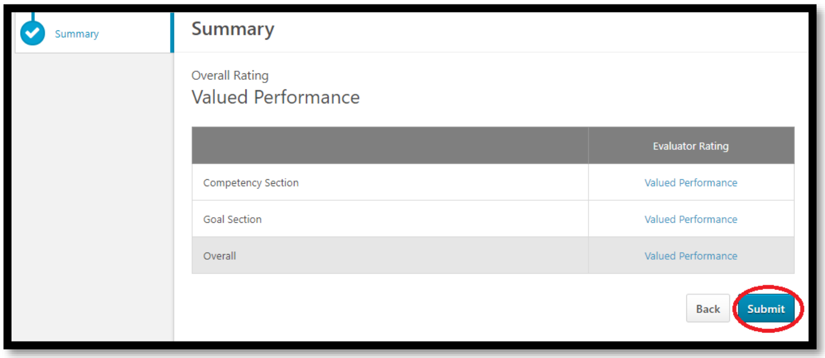


b. You can select the help icon to the right of the dropdown to display a description of all ratings. DO NOT COMMENT, only apply rating.

7. After you have selected a rating for each goal, select **Save and Continue**.

   *Be mindful to select Save and Continue and not blue Submit option. Submit will automatically advance the task to the employee.

8. **<u>Summary Section</u>-** This screen provides you with the employee's overall rating, as well as a rating for the competencies and goals sections, select **Submit**. This will automatically follow step progression and advance the Final Performance Evaluation to the next line supervisor for review.



   *Note the overall score is calculated on a 50-50 split. Competencies will be equally weighted totaling 100%, this is done automatically in the system. Goals will use there defines weights also equaling 100%, each section is worth 50% so the final overall score is an average of the two section ratings.

<u>Evaluator Discussion and Acknowledgment Step for Final Performance Evaluation:</u>

*Note that the Evaluator Review step has a due date five (5) days after the task is launched. Due dates are intended to keep the task on track to meet the compliance date of January 31st. The Evaluator Review step is a required step and will not advance until completed. E-mail notification will be sent to the evaluator once the task is launched and after five (5) days when then the task becomes past due.

1. Once the Final Performance Evaluation has been reviewed by the next line supervisor, the task will return to your action items in MyPURPOSE, select **Launch**. This step is intended for the evaluator to meet/discuss the Final Performance Evaluation with the employee in a face-to-face meeting.

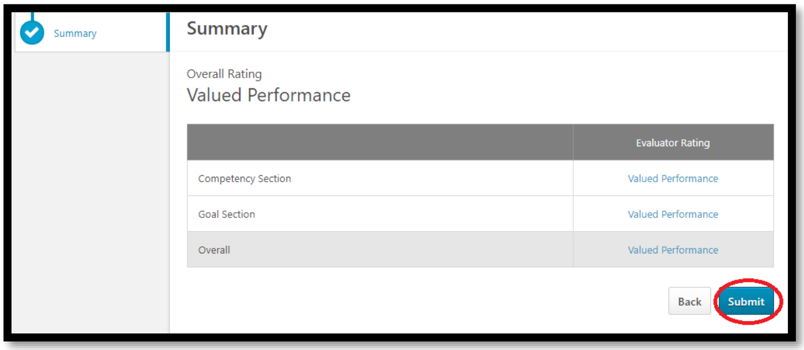
   Each task will start with an overview, please read the Year-End Interim/Final Performance Evaluation overview carefully and select **Get Started**.
   *You will notice beside Get Started you have a **Reopen Step** option. Use this if you need to return the task to the next-line or the employee. If you utilize the reopen feature, please communicate with the individual and close task.

2. **Competency Section**-Review the instructions for the Final Performance Evaluation and scroll down to review the core competencies. Here you will be able to review all comments left by the employee and yourself. This section is read only, select **Next**.

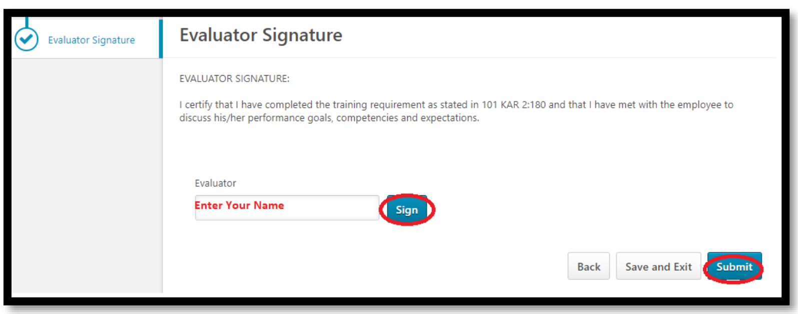
3. **Goal Section**- Review the instruction for the evaluator. Scroll down to review the goals. Here you will be able to review all comments left by the employee and yourself. This section is read only, select **Next**.

   If there are edits needed during this step, reach out to your Performance Management Administrator.

4. **Summary Section**- This screen provides you with the employee's overall rating, as well as a rating for the employee's competencies and goals Sections, select **Next**.



5. **Evaluator Signature Section**- To certify that you have completed all requirements and have met with your employee enter your name and select **Sign** then select **Submit.** This will automatically follow step progression and advance the Final Performance Evaluation to the employee for acknowledgment.



* After the employee has completed the acknowledgement step you can view their completed Performance Evaluation from the performance home page, select the MyEvaluations tab, then select the box next to *Show completed and expired task.* This will list steps and performance reviews you have completed for your employees. You can view the performance review here in a read only view.

Employee Annual Performance Planning

Self Review:
* Note that the Self Review step has a due date five (5) days after receiving. Due dates are intended to keep the task on track to meet the compliance date of January 31st. The Self Review step is optional and will automatically advance after five (5) days. E-mail notification will be sent to the employee once the task is assigned.

1. From the MyPURPOSE Home screen, select the Performance Tile.

2. Select MyPerformance (Actions/Request).

3. You will have a task labeled Complete your Annual Performance Planning, select **Launch**.

4. Each task will start with an overview, please read the Annual Performance Planning overview carefully and select **Get Started.**

5. On the right hand side of your screen, you will notice a dropdown labeled **Options**. Use this to view any documentation that your evaluator has attached or you may add an attachment to the Annual Performance Plan, if desired.

6. **Competency Section**- Review the instructions for the Annual Performance Planning and scroll down to review your core competencies. Select **Save and Continue**.

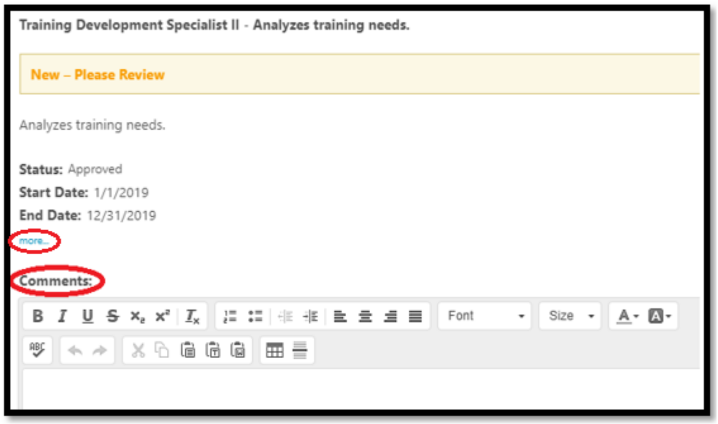
   *You do not have the option to add comments to the competency section of your plan.

7. **Goal Planning**- Review the instruction for the employee.

8. From the goals page you will see a yellow banner identifying all goals added by the evaluator to review.

   a. Select the more button to see the tasks associated with each goal.

   b. The comment box provided is optional and intended for you to provide any feedback to your evaluator about your new goal.



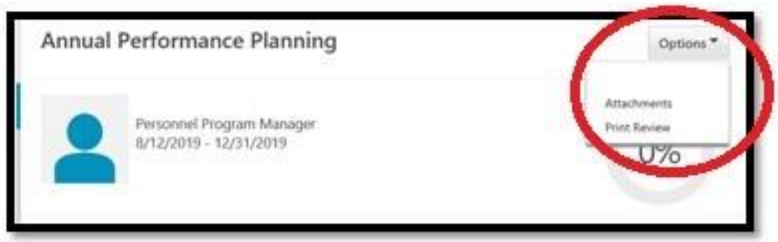
   c. Once all goals and tasks have been reviewed, select **Submit**. You will receive a second submit notice, select **Submit**. This will automatically follow step progression and advance to the evaluator for Goal Review Confirmation.

Employee Acknowledgment:

* Note that the Employee Acknowledgement step has a due date three (3) days after receiving. Due dates are intended to keep the task on track to meet the compliance date of January 31st. The Employee Acknowledgement step is a required step and will not advance until completed. E-mail notification will be sent to the employee once the task is assigned and after three (3) days when then the task becomes past due.

1. Once you and your evaluator have met and completed the Discussion and Acknowledgment step, the Annual Performance Plan will automatically follow step progression and return to your Action items in MyPURPOSE, select **Launch.**

2. On the right hand side of your screen, you will notice a dropdown labeled **Options**. Use this to view any documentation that your evaluator has attached or you may add an attachment to the Annual Performance Plan, if desired.



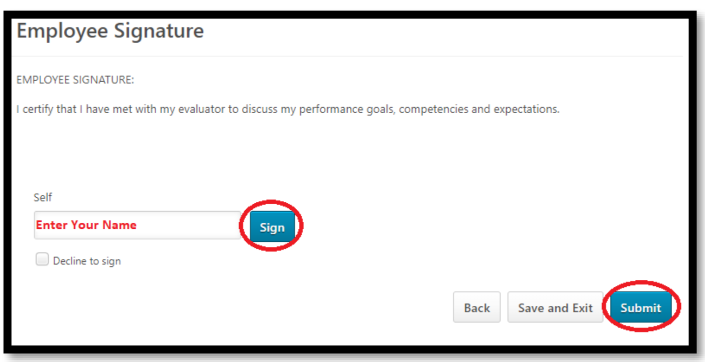
3. Each task will start with an overview, please read the Annual Performance Planning overview carefully and select **Get Started**.

4. **<u>Competency Section</u>**- Review the instructions for the Annual Performance Planning and scroll down to review the core competencies and all comments left by your evaluator. This section is read only, select **Next.**

5. **<u>Goal Section</u>**- Review the instructions for the employee and scroll down to review your goals and all comments left by your evaluator, next line supervisor and yourself. This section is read only, select **Next.**

6. **<u>Employee Signature Section</u>**- To certify that you have met with your evaluator and discussed your goals, competencies and expectations, enter your name and select **Sign** then select **Submit.**

   *Note, if the employee chooses to select "Decline To Sign", the task must still be completed by selecting **Submit.**



The Annual Plan is now complete!

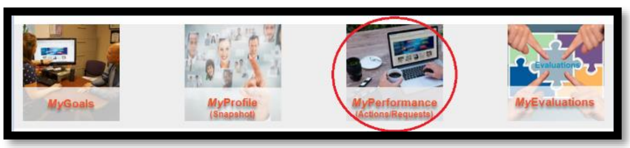
Employee Mid-Year Interim

Self Review:

* Note that the Self Review step has a due date five (5) days after receiving. Due dates are intended to keep the task on track to meet the compliance date of July 31st. The Self Review step is optional and will automatically advance after five (5) days. E-mail notification will be sent to the employee once the task is assigned.

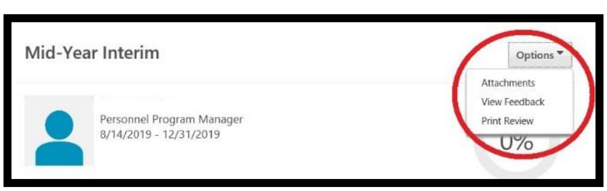
1. From the MyPURPOSE Home screen, select the Performance Tile.

2. Select MyPerformance (Actions/Request).



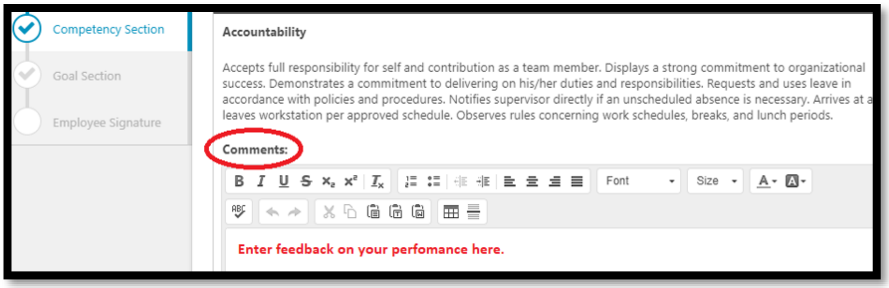
3. Select **Launch** to Complete your Mid-Year Interim Review. Please note that once the action has been assigned to you, you have five (5) days to review or it will automatically route to your evaluator.

9. On the right hand side of your screen, you will notice a dropdown labeled **Options**. Use this to view any documentation that your evaluator has attached or you may add an attachment to the Mid-Year Interim, if desired.

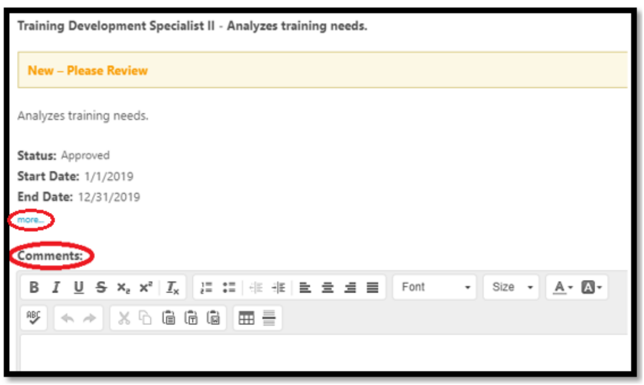


4. Each task will start with an overview, please read the Mid-Year Interim Review overview carefully and select **Get Started.**

5. **<u>Competency Section</u>**- Review the instructions for the Mid-Year Interim Review and scroll down to review your core competencies.
    a. You have the option to include comments on each competency listed, we strongly encourage you to provide feedback to your evaluator.



6. After you have reviewed and commented on all competencies, select **Save and Continue**.
7. **<u>Goal Section</u>**- Review the instruction for the employee.
8. From the Goals page, review your goals.
    a. Select the more button to see the tasks and percentages assigned to each goal.
    b. You have the option to include comments on each goal listed, we strongly encourage you to provide feedback to your evaluator.



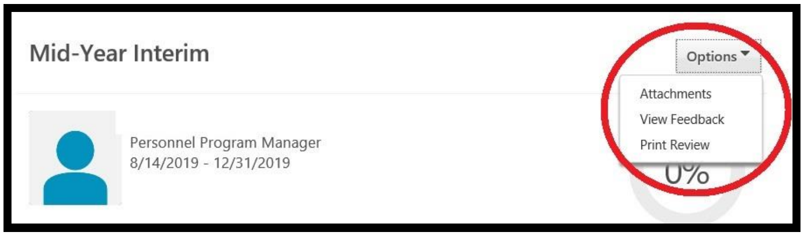
    c. Once all goals have been reviewed and you have left comments, select **Submit**.
    d. Your task will automatically follow step progression and advance to the evaluator for review. There is no acknowledgement step for the Self Review.

<u>Employee Acknowledgment:</u>

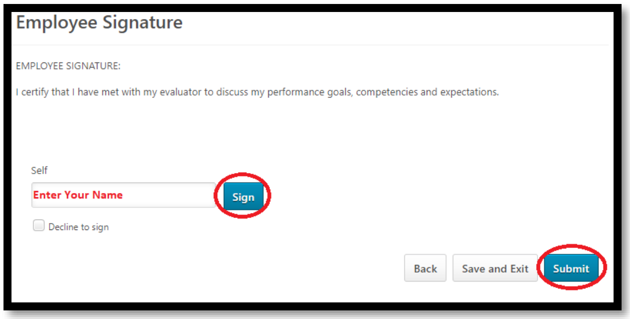
* Note that the Employee Acknowledgment step has a due date five (5) days after receiving. Due dates are intended to keep the task on track to meet the compliance date of July 31st. The Employee Acknowledgment step is a required step and will not advance until completed. E-mail notification will be sent to the employee once the task is assigned and after five (5) days when then the task becomes past due.

1. Once you and your evaluator have completed the Discussion and Acknowledgment step for the Mid-Year Interim Review, the task will return to your Action items in MyPURPOSE, select **Launch.**

2. On the right hand side of your screen, you will notice a dropdown labeled **Options**. Use this to view any documentation that your evaluator has attached or you may add an attachment to the Annual Performance Plan, if desired.



3. Each task will start with an overview, please read the Mid-Year Interim Review overview carefully and select **Get Started**.
4. <u>**Competency Section**</u>- Review the instructions for the Mid-Year Interim Review and scroll down to review the core competencies. This section is read only, comments from the evaluator and yourself are visible, select **Next.**
5. <u>**Goal Section**</u>- Review the instructions for the employee and scroll down to review your goals and all comments left by your evaluator and yourself. This section is read only, select **Next.**
6. <u>**Employee Signature Section**</u>- If you certify that you have met with your evaluator and discussed your goals, competencies and expectations, enter your name and select **Sign** then select **Submit**.



*Note, if the employee chooses to select "Decline To Sign", the task must still be completed by selecting **Submit.**

Mid-Year Interim Review is now complete!

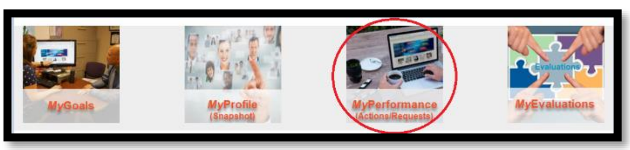
Employee Year End Interim/Final Performance Evaluation

Self Review:

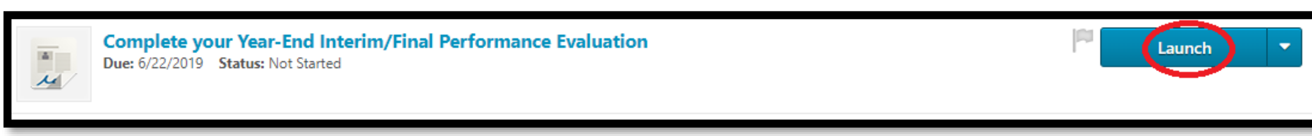
* Note that the Self Review step has a due date five (5) days after receiving. Due dates are intended to keep the task on track to meet the compliance date of January 31st. The Self Review step is optional and will automatically advance after five (5) days. E-mail notification will be sent to the employee once the task is assigned and after five (5) days, when then the task becomes past due.

1. From the MyPURPOSE Home screen, select the Performance Tile.

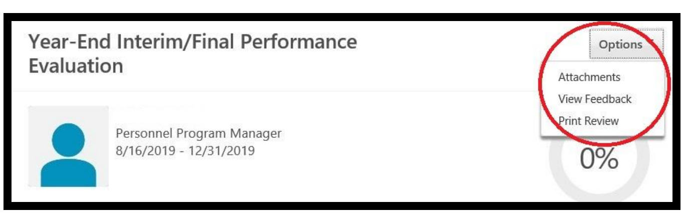
2. Select MyPerformance (Actions/Request).



3. Select **Launch** next to Complete your Year-End Interim/Final Performance Evaluation.

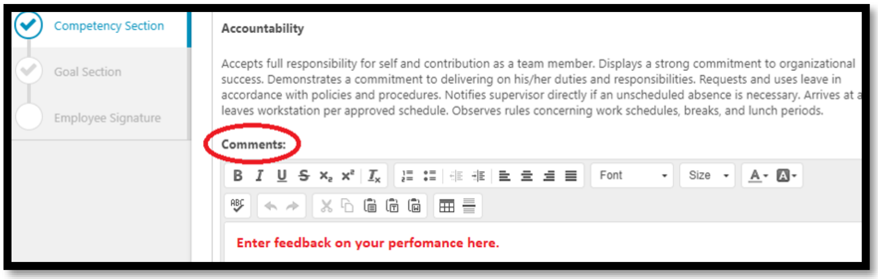


7. On the right hand side of your screen, you will notice a dropdown labeled **Options**. Use this to view any documentation that your evaluator has attached or you may add an attachment to the Year-End Interim, if desired.



4. Each task will start with an overview, please read the Year-End Interim overview carefully and select **Get Started.**

5. **Competency Section**- Review the instructions for the Year-End Interim and scroll down to review the core competencies.
    a. You have the option to include comments on each competency listed, we strongly encourage you to provide feedback to your evaluator.

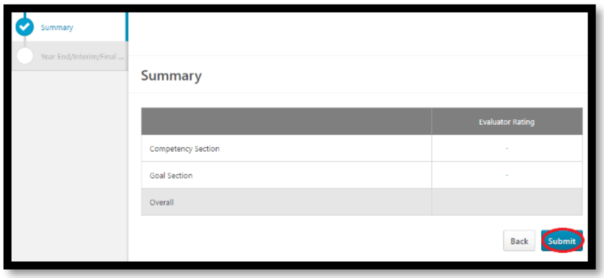


6. After you have reviewed and commented on all competencies, select **Save and Continue**.
7. **Goal Section**- Review the instructions for the employee and scroll down to review your goals.
    a. You have the option to include comments on each goal listed, we strongly encourage you to provide feedback to your evaluator.

   After you have reviewed and commented on all goals, select **Save and Continue**.

   *Be mindful to select **Save and Continue** and not the blue **Submit** option. Submit will automatically advance the task to the evaluator. There is no acknowledgement step for the Self Review.

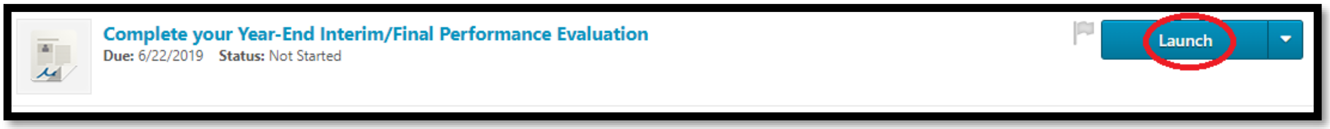
8. **Summary Section**- This screen is blank as there are no ratings associated with the Year-End Interim, select **Submit**. This will automatically follow step progression and advanced the task to your evaluator for review.



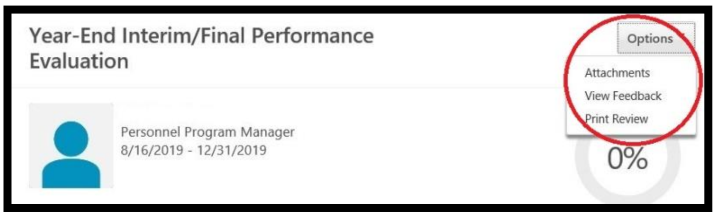
Employee Acknowledgment:

*Note that the Employee Acknowledgment step has a due date two (2) days after the task is launched. Due dates are intended to keep the task on track to meet the compliance date of January 31st. The Employee Acknowledgment step is a required step and will not advance until completed. E-mail notification will be sent to the employee once the task is launched and after two (2) days when then the task becomes past due.

1. Once you and your evaluator have completed the Discussion and Acknowledgment section, the Year-End Interim/Final Performance Evaluation task will return to your Action items in MyPURPOSE, select **Launch.**



2. On the right hand side of your screen, you will notice a dropdown labeled **Options**. Use this to view any documentation that your evaluator has attached or you may add an attachment to the Year-end Interim, if desired.



3. Each task will start with an overview, please read the Year-End Interim overview carefully and select **Get Started**.

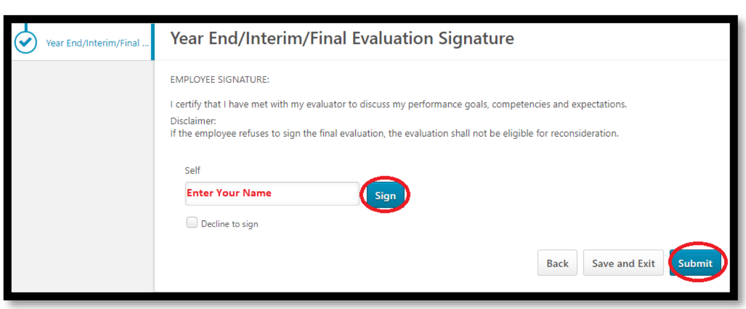
4. **<u>Competency Section</u>**- Review the instructions for the Year-End Interim and scroll down to review the core competencies. Here you will be able to review all comments left by your evaluator and yourself. This section is read only, select **Next.**

5. **<u>Goal Section</u>**- Review the instructions for the employee and scroll down to review your goals and tasks. Here you will be able to review all comments left by your evaluator and yourself. This section is read only, select **Next.**

6. **<u>Summary Section</u>**- This screen is blank as there are no ratings associated with the Year-End Interim, select **Next.**

7. **<u>Employee Signature Section</u>**- If you certify that you have met with your evaluator and discussed your goals, competencies and expectations, enter your name and select **Sign** then select **Submit.** This will automatically follow step progression and advance the Year-End Interim/Final Performance Evaluation to your evaluator to apply the final ratings.

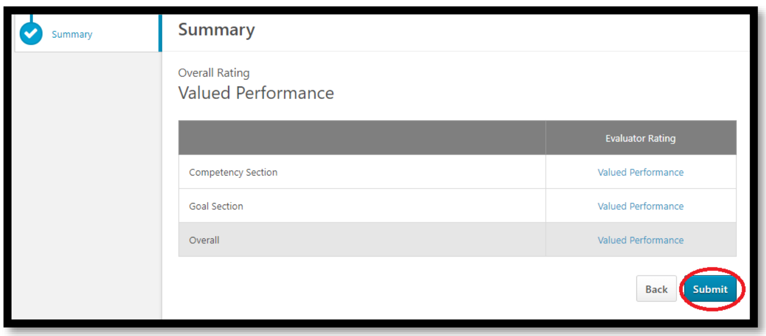
   *Note, if the employee chooses to select "Decline To Sign", the task must still be completed by selecting **Submit.**



Employee Acknowledgment:

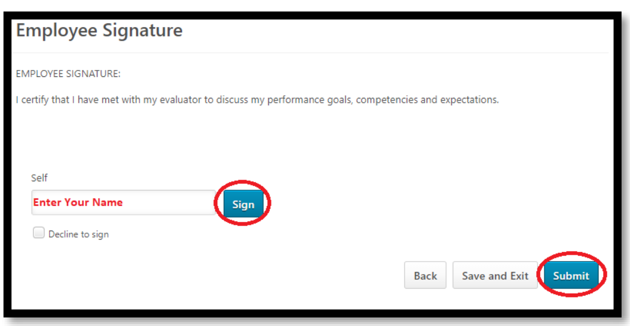
*Note that the Employee Acknowledgment step has a due date two (2) days after the task is launched. Due dates are intended to keep the task on track to meet the compliance date of January 31st. The Employee Acknowledgment step is a required step and will not advance until completed. E-mail notification will be sent to the employee once the task is launched and after two (2) days when then the task becomes past due.

1. **Competency Section**-Review the instructions for the Final Performance Evaluation and scroll down to review the core competencies. Here you will be able to review all comments left by the evaluator and yourself. This section is read only, select **Next**.
2. **Goal Section**- Review the instruction for the Final Performance Evaluation and scroll down to review the goals. Here you will be able to review all comments left by the evaluator and yourself. This section is read only, select **Next**.
3. **Summary Section**- This screen provides you with your overall rating, as well as a rating for your competencies and goals, select **Next**.



4. **Employee Signature Section**- To certify that you have met with your evaluator, enter your name and select **Sign** then select **Submit.**

   *Note, if the employee chooses to select "Decline To Sign", the task must still be completed by selecting **Submit.**



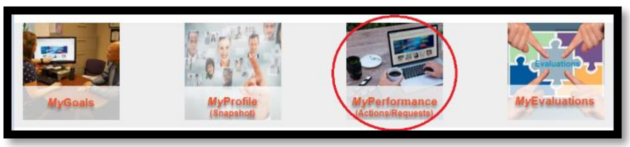
The Final Performance Evaluation is Completed

Next Line Supervisor Annual Performance Planning Review

*Note that the Next Line Supervisor Review step has a due date five (5) days after the task is launched. Due dates are intended to keep the task on track to meet the compliance date of January 31st. The Next Line Supervisor Review step is a required step and will not advance until completed. E-mail notification will be sent to the evaluator once the task is launched and after five (5) days when then the task becomes past due.

1. From the MyPURPOSE Home screen, select the Performance Tile.

2. Select MyPerformance (Actions/Request).

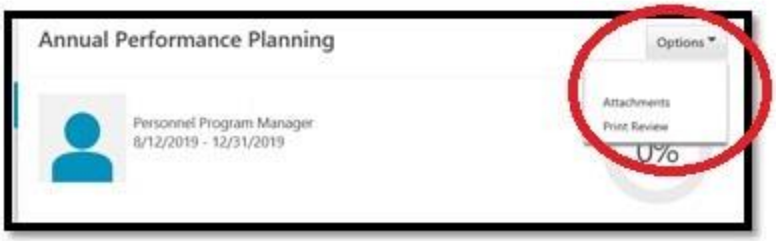


3. Select **Launch** next to your Next-Line Supervisor Annual Performance Planning task, you will have separate task for each employee.

4. Each task will start with an overview, please read the Annual Performance Planning overview carefully and select **Get Started**.

   * You will notice beside Get Started you have a **Reopen Step** option. Use this if you need to return the task to the employee for Self Review or the evaluator for modification. If you utilize the reopen feature please close task, do not submit. When a task is reopened the task will show in your worklist and in the employees/evaluators at the same time. It is imperative that you communicate outside the system when the task is reopened.

5. On the right hand side of your screen, you will notice a dropdown labeled **Options**. Use this to view any documentation that the evaluator or employee has attached or you may add an attachment to the Performance Plan if desired.



6. **Competency Section**- Review the instruction for the Annual Performance Planning and scroll down to review the core competencies. This section is read only, review and select **Save and Continue**.

7. **Goal Planning Section** – Review the instructions and scroll to review the employee goals. This section is read only, comments from employee and evaluator will be visible. Select **Save and Continue.**

8. **Next Line Supervisor Signature Section**- Enter your name and select **Sign** then select **Submit.** This will automatically follow step progression and advance the plan back to the evaluator for the evaluator/employee discussion meeting and acknowledgment steps.

Next Line Supervisor Mid-Year Interim Review:

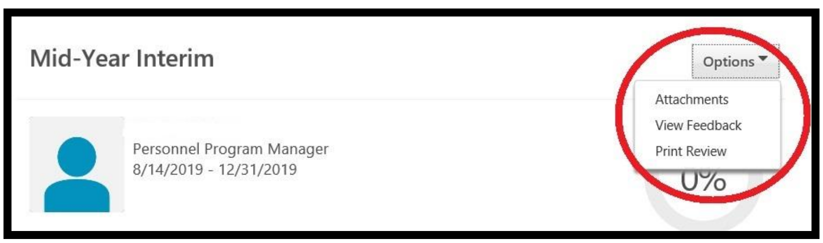
*Note that the Next Line Supervisor Review step has a due date five (5) days after the task is launched. Due dates are intended to keep the task on track to meet the compliance date of July 31st. The Next Line Supervisor Review step is an optional step and will automatically advance to the evaluator after Five (5) days. E-mail notification will be sent once the task is launched and after five (5) days when then the task becomes past due.

1. From the MyPURPOSE Home screen, select the Performance Tile.

2. Select MyPerformance (Actions/Request).

3. You will have a separate task for each employee. Select **Launch** next to the Next Line supervisor Mid-Year Interim Review task.

4. On the right hand side of your screen, you will notice a dropdown labeled **Options**. Use this to view any documentation that the employee or evaluator has attached or you may add an attachment to the Mid-Year Interim Review if desired.



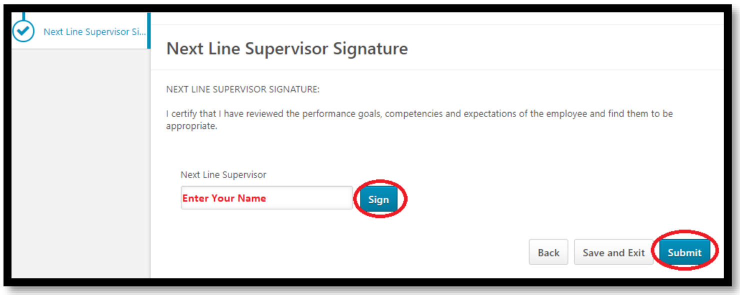
5. Each task will start with an overview, please read the Mid-Year Interim Review overview carefully and select **Get Started**.

   * You will notice beside Get Started you have a **Reopen Step** option. Use this if you need to return the task to the employee for Self Review or the evaluator for modification. If you utilize the reopen feature please close task, do not submit. When a task is reopened the task will show in your worklist and in the employees/evaluators at the same time. It is imperative that you communicate outside the system when the task is reopened.

6. **<u>Competency Section</u>**- Review the instruction for the Mid-Year Interim Review and scroll down to review the core competencies. This section is read only, comments from employee and evaluator are visible. Select **Save and Continue.**

7. **Goal Section** – Review the instructions and scroll down to review the employee goals. This section is read only, comments from employee and evaluator are visible. Select **Save and Continue.**

8. **Next Line Supervisor Signature Section**- Enter your name and select **Sign** then select **Submit.** This will automatically follow step progression and advance the task back to the evaluator for evaluator/employee discussion meeting and acknowledgment steps.



Next Line Supervisor Year End Interim/Final Performance Evaluation

*Note that the Next Line Supervisor Review step has a due date five (5) days after the task is launched. Due dates are intended to keep the task on track to meet the compliance date of January 31st. The Next Line Supervisor Review step is an required step and will automatically advance to the evaluator after Five (5) days. E-mail notification will be sent once the task is launched and after five (5) days when then the task becomes past due.

1. From the MyPURPOSE Home screen, select the Performance Tile.

2. Select MyPerformance (Actions/Request).

3. Select **Launch** next to Next Line Supervisor Year-End Interim/Final Performance Evaluation, you will have separate tasks for each employee.

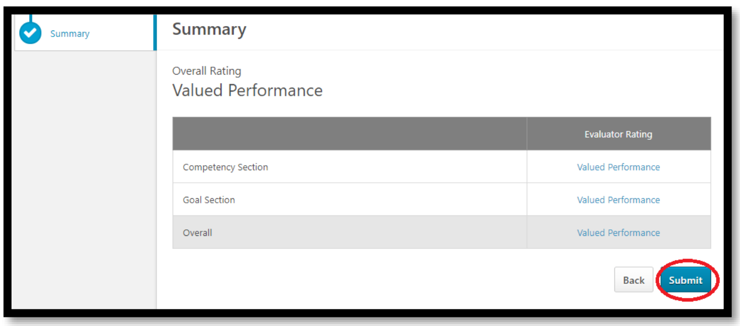
4. Each task will start with an overview, please read the Year-End Interim/Final Performance Evaluation overview carefully and select **Get Started**.

   * You will notice beside Get Started you have a **Reopen Step** option. Use this if you need to return the task to the employee or the evaluator for modification. If you utilize the reopen feature please close task, do not submit. When a task is reopened the task will show in your worklist and in the employees/evaluators at the same time. It is imperative that you communicate outside the system when the task is reopened.

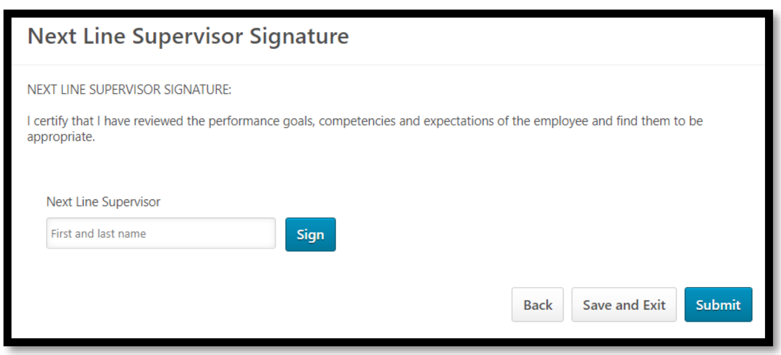
5. **Competency Section**- Review the instruction for the Year-End Interim/Final Performance evaluation and scroll down to review the core competencies. This section is read only, comments from employee and evaluator are visible. Select **Save and Continue.**

6. **Goal Section** – Review the instructions and scroll down to review the employee goals. This section is read only, comments from employee and evaluator will be visible. Select **Save and Continue.**

7. **Summary Section-** This screen provides you with the employee's overall rating as well as a rating for the competency and goal section select **Next**.



8. **Next Line Supervisor Signature Section**- Enter your name and select **Sign** then select **Submit.** This will automatically follow step progression and advance the plan back to the evaluator for evaluator/employee discussion meeting and acknowledgment steps.



Off Cycles:

New Position Performance Plan

If an employee's position or job title changes during the review period, the evaluator must create a new Annual Performance Plan no later than thirty (30) calendar days after the start date of the change. **Do not** create a New Position Plan if are missing an employee's Annual Performance Planning Task after the January 1st launch.

If you received an employee and a previous performance task was not completed by the previous supervisor, the performance review task will automatically be assigned to you, take no action on the task. Contact your PM Admin for assistance, the previous manager **must** complete task.

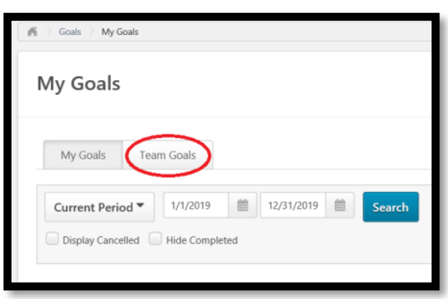
*If you receive an employee 2/1 or 2/16 ensure that the initial Annual Performance Plan has been completed by the prior evaluator.
*If you receive an employee 08/1 or 8/16 ensure that the Mid-Year Interim Review has been completed by the prior evaluator.
*If you receive an employee after November 1st the Final Evaluation must be completed by the prior evaluator.

To ensure a previous review step is completed:

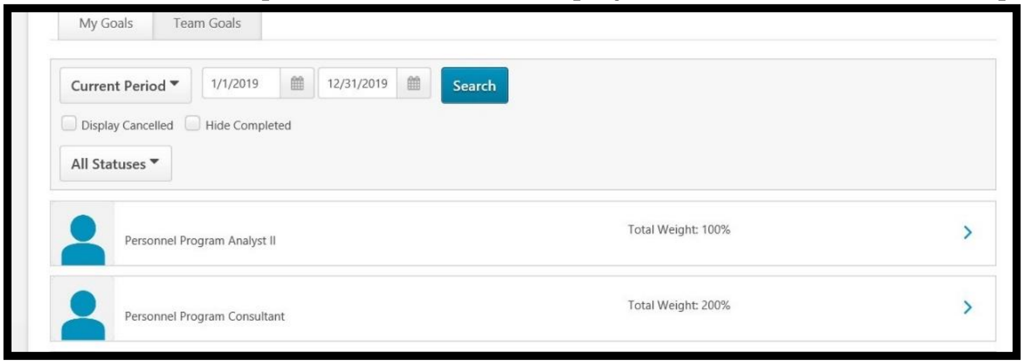
1. From the MyPURPOSE home screen, select the Performance tile.

2. Select MyGoals.

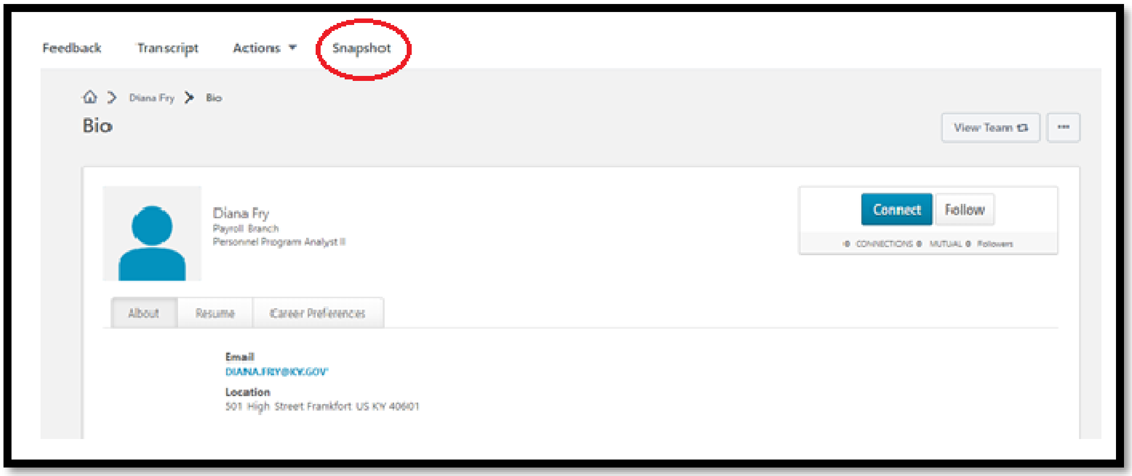
3. From the MyGoals page, select **Team Goals.**



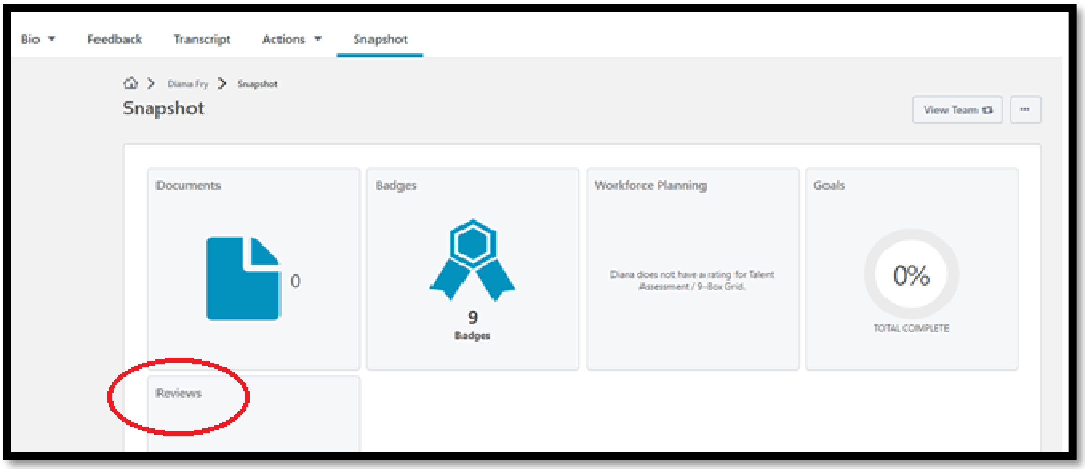
4. Validate the review period and select the employees name to launch their bio page.



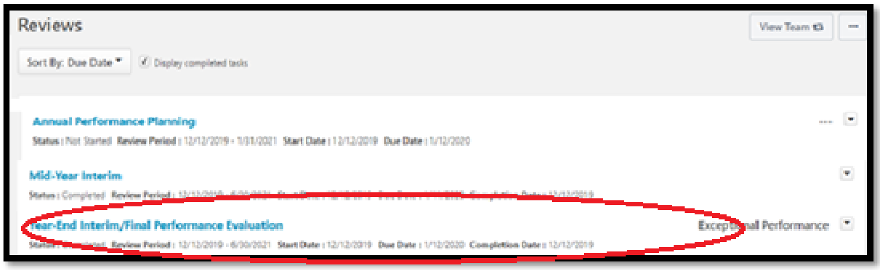
5. From the employee's bio page select the Snapshot tab.



6. Select the Review tile



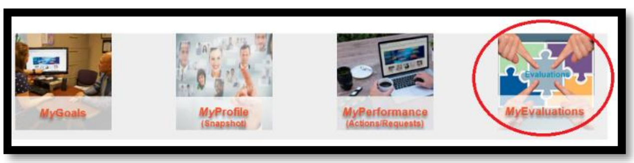
7. Review the list to ensure the previous performance step is completed.



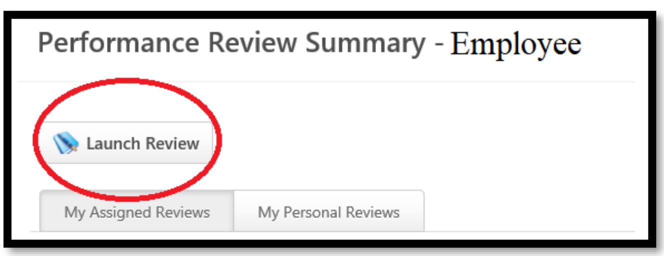
To complete a New Position Performance Plan:

1. From the MyPURPOSE home screen, select the Performance tile.

2. Select MyEvaluations.



3. From the Performance review screen, select **Launch Review**.

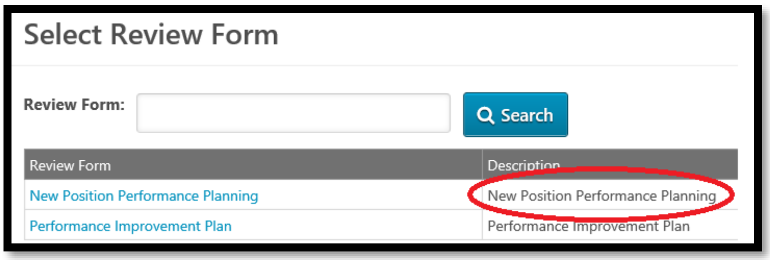


4. From the Launch Performance Summary Review screen enter the following information and select **Launch**.

   a. Who is the review for? Select, **Someone else**

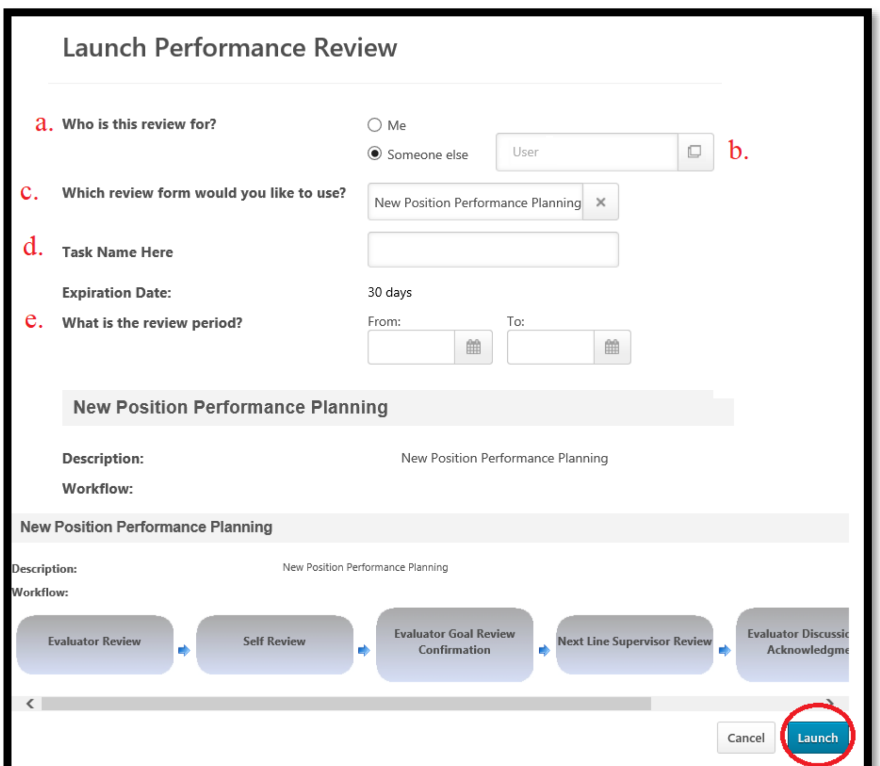
   b. Click **User**. Here you can search by employee's name, User ID or your last name. Select **Search** and choose the employee's name you wish to launch an Annual Performance Plan.

   c. Select **Review Form** and choose **New Position Performance Planning**.

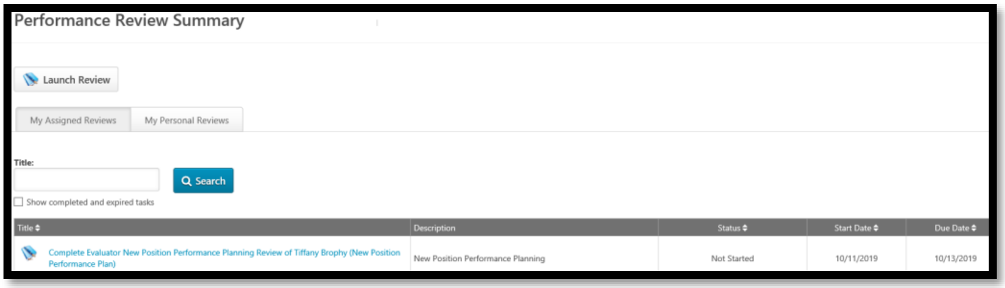


   d. Enter a tile for the review. Example: New Position Performance Plan for (employee name)

   e. Enter the current Review period, employee's start date to the end of the year.

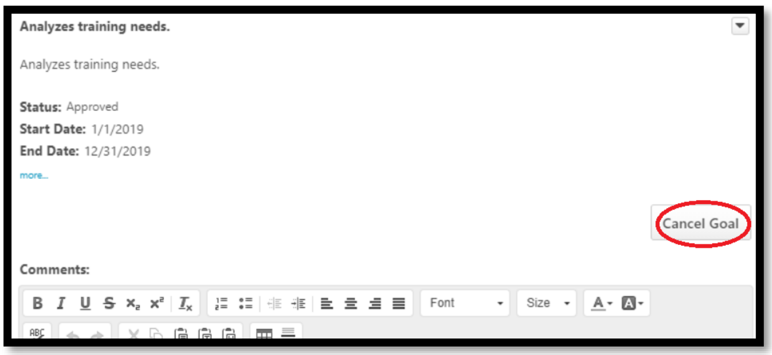


5. The New Position Performance Planning Review task will appear in your Performance Review Summary pageor as a task in your Actions. From the Performance Review Summary page, select **Complete Evaluator New Position Performance Planning Review.**



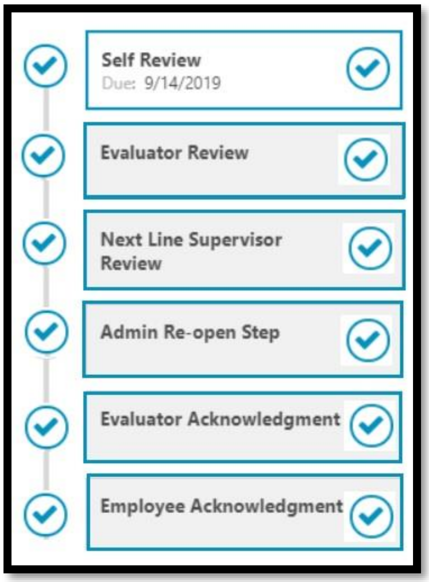
6. See the Evaluator's Annual Performance Planning section to complete an Annual Performance Plan.

   *Please note that when your reach the Goal Planning Section of the new Annual Performance Plan you must cancel the employee's current goals before assigning new goals. To cancel a goal select **Cancel Goal** beside each current task.



Reconsideration

Tasks Step Progression



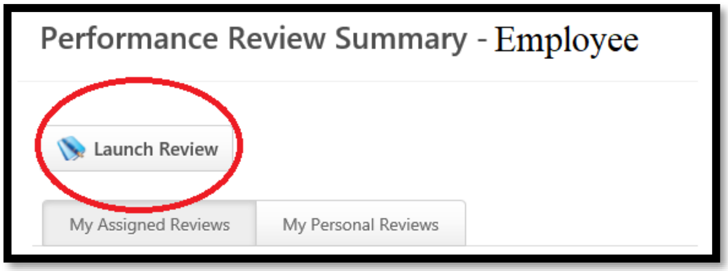
Employee

Employees are responsible for launching the reconsideration task within five (5) working days of the Final Evaluation meeting. If the employee refused to sign the Final Performance Evaluation, they are not eligible for reconsideration. If the employee does not launch the reconsideration task within five (5) working days of the discussion with the evaluator, they are not eligible for reconsideration.

1. 1. From the MyPURPOSE home screen, select the Performance tile.

2. Select MyEvaluations.

3. From the Performance review screen, select **Launch Review**.



4. From the Launch Performance Review screen, enter the following information and select **Launch.**

    a. Who is the review for? **Me**

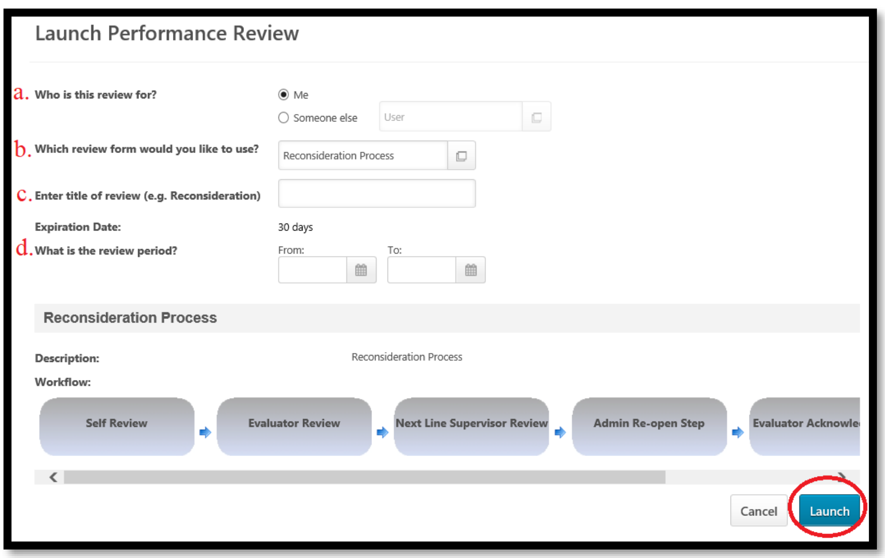
    b. Which review form would you like to use? **Reconsideration Process**

    c. Enter title of Review. **Reconsideration of insert year Evaluation**

    d. What is the Review period?

        Launch Date = **Todays date**

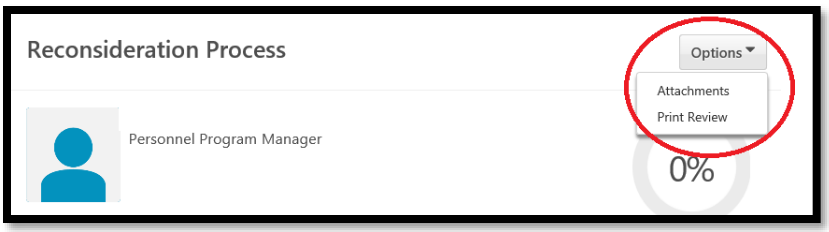
        End Date = Thirty **(30) calendar days after launch date**



5. The Reconsideration Task will appear in your Performance Review Summary page or as a task in your Actions. From the Performance Review Summary page, select **Complete Reconsideration Review.**

6. On the right hand side of your screen, you will notice a dropdown labeled **Options**. Use this to attach a copy of your final evaluation.

   *See the Additional Features section to obtain a PDF of your evaluation.



7. Each task will start with an overview, please read the Reconsideration Process overview carefully and select **Get Started**.

8. Provide detailed responses to both questions listed and select **Submit**. This will automatically follow step progression and advance the Reconsideration task to the evaluator.

<u>Employee Reconsideration Acknowledgment</u>

a. If the evaluator and/or next line supervisor decides **not** to make a change, the task will return to your action items in MyPURPOSE, select **Launch** and proceed to step one (1) below.

b. If the evaluator and/or next line supervisor accept your reconsideration, the task will return to your Action items in MyPURPOSE after your evaluator has made any necessary changes to your Final Performance Evaluation. Select **Launch.**

1. Each task will start with an overview, please read the Reconsideration Process overview carefully and select **Get Started**.

2. **<u>Reconsideration Process</u>** -Review the instructions for the employee. This section is read only, your response for both questions are visible. Select **Save and Continue**.

3. **<u>Reconsideration Evaluator Decision</u>**- Review the instructions for the Evaluator Decision. This section is read only, your evaluator's decision and response for both questions are visible. Select **Save and Continue**.

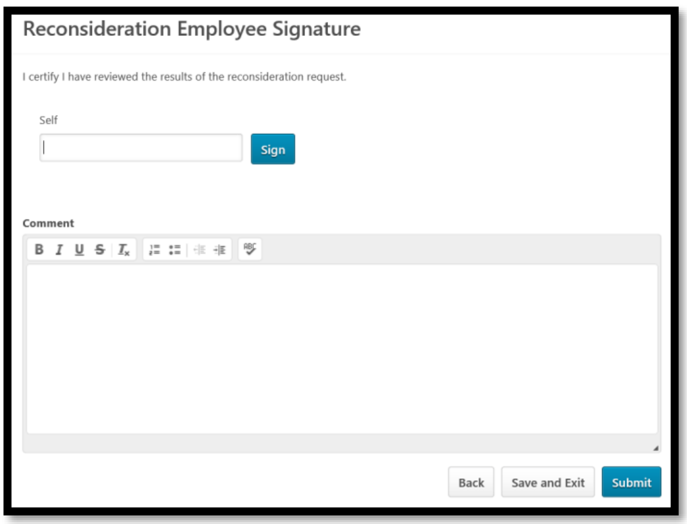
4. **<u>Reconsideration Evaluator Signature</u>**- This screen is to verify that your evaluator has reviewed the next line supervisor's decision and made any necessary changes to your Final Performance Evaluation. Select **Save and Continue**.

5. **<u>Reconsideration Next Line Supervisor Decision</u>**- Review the instructions for the next line supervisor Decision. This section is read only, your next line supervisor's decision and response for both questions are visible. Select **Save and Continue**.

6. **<u>Reconsideration Next Line Supervisor Signature</u>**- This screen is to verify that the next line supervisor reviewed the Reconsideration and provided their final decision. Select **Save and Continue.**

7. **<u>Reconsideration Employee Signature</u>-** This screen is to verify that you have reviewed the results of your Reconsideration request. If your Reconsideration was accepted, please view the PDF version of your updated Final Performance Evaluation to ensure changes that were agreed upon were made. Once you have verified the changes on your Final Performance Evaluation you will acknowledge the Reconsideration task. Enter your name and select **Sign.** You also have the option to provide any final comments, select **Submit**.

   *See the Additional Features section to obtain a PDF of your evaluation.



This completes the Reconsideration process.

Evaluator

Within in five (5) working days of receiving the Reconsideration request, the evaluator shall review and respond to the request. If the evaluator does not respond within five (5) days, the employee may submit a written request to the appointing authority. The agency must respond to the request for Reconsideration and comply with 101 KAR 2:190.

1. From the MyPURPOSE home screen, select the Performance tile.

2. Select MyPeformance (Actions/Request).

3. You will have a task for each employee that requests a Reconsideration. Select **Launch** next to a Reconsideration task.

4. Each task will start with an overview, please read the Reconsideration Process overview carefully and select **Get Started**.

5. **<u>Reconsideration Process</u>**- Review the instructions for the evaluator/next line supervisor. This section is read only, a detailed response from the employee for both questions is visible. Select **Save and Continue**.

6. **<u>Reconsideration Evaluator Decision</u>**-Review the instructions for the Reconsideration Evaluator Decision. Based on the information provided by the employee, choose the **Manager Reconsideration Decision** dropdown and select your decision.

    a. If you choose **Yes, changes WILL be made,** you have the option to include comments in the additional comments section.

    b. If you choose **No, Changes WILL NOT be made,** you have the option to include comment in the additional comments section.

    After you have selected your decision and left any necessary comments, select **Submit**. This will automatically follow step progression and advance the Reconsideration task to the next line supervisor.

*Please note that the next line supervisor makes the final decision in the Reconsideration process.

Employee’s Final Evaluation reopened for changes

*Note: This is separate from the Reconsideration Task)

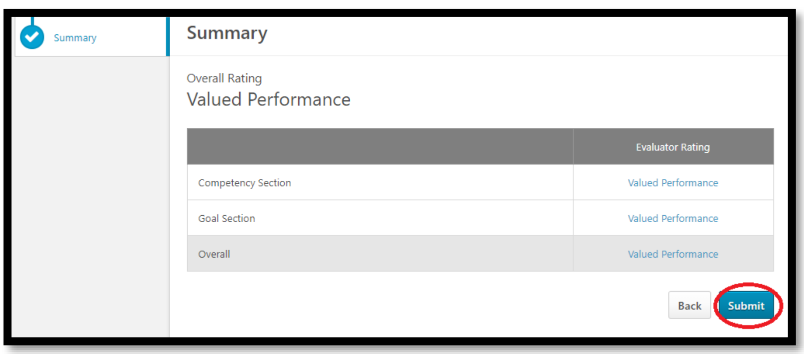
1. If the next line supervisor accepted the reconsideration request, they should notify the evaluator. The evaluator will contact the agency Performance Administrator to submit a business request to the Personnel Cabinet to reopen the Final Evaluation back to your Action/Requests. Once the task is reopened, it will appear in your Actions/Requests. Select **Launch** next to the task.

2. Each task will start with an overview, please read the Final Performance Evaluation overview carefully and select **Get Started**.

3. **Competency Section**- Review the instruction for the evaluator. Review prior comments from the employee, next line supervisor and yourself. Make any necessary changes to the rating or comments depending on the reason for the Reconsideration. Select **Save as Draft and Continue.**

4. **Goal Section**- Review the instruction for the evaluator. Review prior comments from the employee, next line supervisor and yourself. Make any necessary changes to the rating or comments depending on the reason for the Reconsideration. Select **Save as Draft and Continue.**

5. **Summary Section**- This screen provides you with the employee’s overall rating, as well as a rating for the employee’s competencies and goals sections, select **Submit**. The Reconsideration task will now automatically follow step progression and route back to you the evaluator for acknowledgment.



Evaluator Acknowledgment of Reconsideration Task

1. From your Action items select **Launch** next to the Reconsideration task.

2. Each task will start with an overview, please read the Reconsideration Process overview carefully and select **Get Started**.

3. **<u>Reconsideration Process</u>** -Review the instructions for the evaluator/next line supervisor. This section is read only, the employee's response for both questions are visible, select **Next**.

4. **<u>Reconsideration Evaluator Decision</u>**- Review the instructions for the Evaluator Decision. This section is read only, your prior response for both questions are visible, select **Next**.

5. **<u>Reconsideration Evaluator Signature</u>**- To certify that you have reviewed the results and made any necessary changes to the employee's Final Performance Evaluation, enter your name and select **Sign** and then **Save and Continue**.

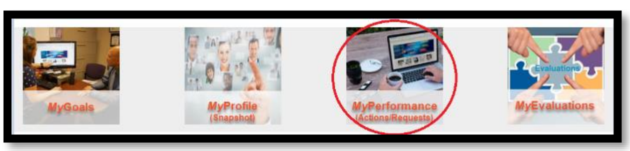
6. **<u>Reconsideration Next Line Supervisor Signature</u>**- This screen is to verify that the next line supervisor reviewed the Reconsideration and provided their final decision, select **Submit.** This will automatically follow step progression and route to the employee for acknowledgment.

Next Line Supervisor

The next line supervisor shall complete their decision step no later than fifteen (15) working days after receiving the Employee's Reconsideration request.

1. From the MyPURPOSE home screen, select the Performance tile.

2. Select MyPerformance (Actions/Request).



3. You will have a task for each employee that requests a Reconsideration. Select **Launch** next to a Reconsideration task.

4. Each task will start with an overview, please read the Reconsideration Process overview carefully and select **Get Started**.

5. **Reconsideration Process**- Review the instructions for the evaluator/next line supervisor. This section is read only, a detailed response from the employee for both questions is visible. Select **Save and Continue**.

6. **Reconsideration Evaluator Decision**- Review the instructions for the Reconsideration Evaluator Decision. This section is read only, here you will see the Evaluator's Reconsideration Decision and any comments left by the evaluator. Select **Save and Continue**.

7. **Reconsideration Next Line Supervisor Decision**- Review the instructions for the Reconsideration Next Line Supervisor Decision. Based on the information provided by the employee and evaluator choose the **Next Line Supervisor Reconsideration Decision** dropdown and select your decision.

    a. If you choose **Yes, changes WILL be made,** you have the option of including comments in the additional comments section.

    b. If you choose **No, Changes WILL NOT be made,** you have the option of including comment in the additional comments section.

    After you have selected your decision and left any necessary comments, select **Save and Continue**.

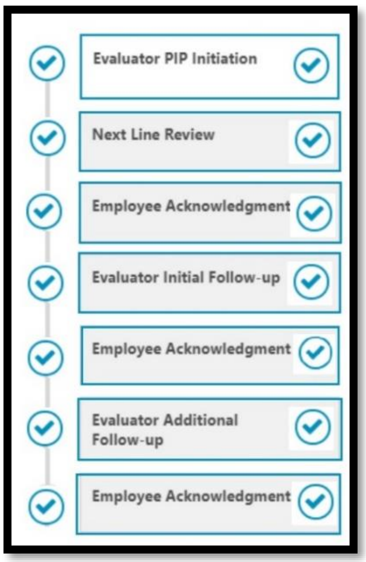
8. **Reconsideration Next Line Supervisor Signature**- To certify that you have reviewed all information submitted and have provided your final decision to the Reconsideration request, enter your name and select **Sign** and then **Submit**. This will automatically route to the System Administrator at the Personnel Cabinet.

*Please note that the next line supervisor makes the final decision in the Reconsideration process. If the next line chooses not to accept the Reconsideration request the system administrator within the Personnel Cabinet will launch the task back to the employee for acknowledgment. If the next line agrees with reconsideration request, and decides there will be a change they should contact their agency Performance Administrator. The Performance Administrator is responsible for submitting a business request to the Personnel Cabinet to reopen the Final Evaluation task back to the evaluator for changes.

Performance Improvement Plan

A Performance Improvement Plan (PIP) is designed to facilate constructive discussion between the employee and the evaluator when it may become necessary to help an employee improve performance. This is an optional process that can be used to help guide and document performance improvement. The evaluator is responsible for initating the Perfromance Improvement Plan. An evaluator can initate a Performance Improvement Plan at any time throughout the year. A Performance Improvement Plan can also be initated multiple times throughtout the year by the evaluator if needed.

Tasks Step Progression

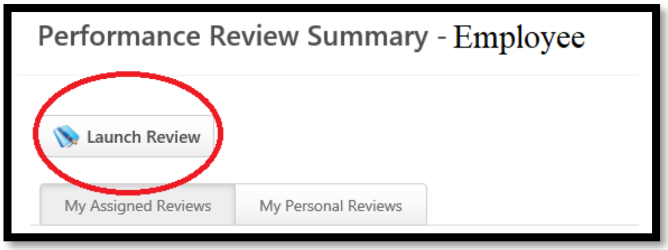


Evaluator

1. From the MyPURPOSE home screen, select the Performance tile.

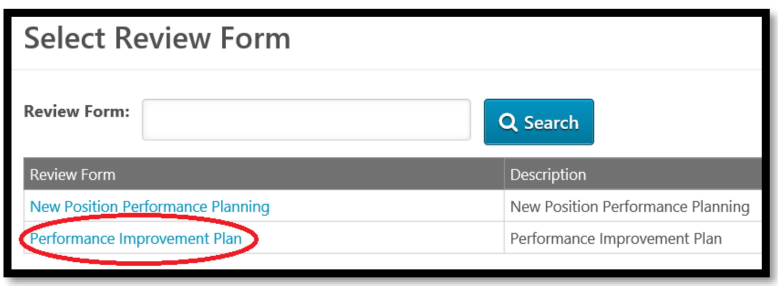
2. Select MyEvaluations.

3. From the Performance review screen, select **Launch Review**.



4. From the Launch Performance Review screen, enter the following information and select **Launch.**
    a. Who is the review for? Select **Someone else**
    b. Click **User**. Here you can search by employee's name, User ID or your last name. Select **Search** and choose the employee's name you wish to launch a Performance Improvement Plan.

    c. Select Review Form and choose **Performance Improvement Plan**.

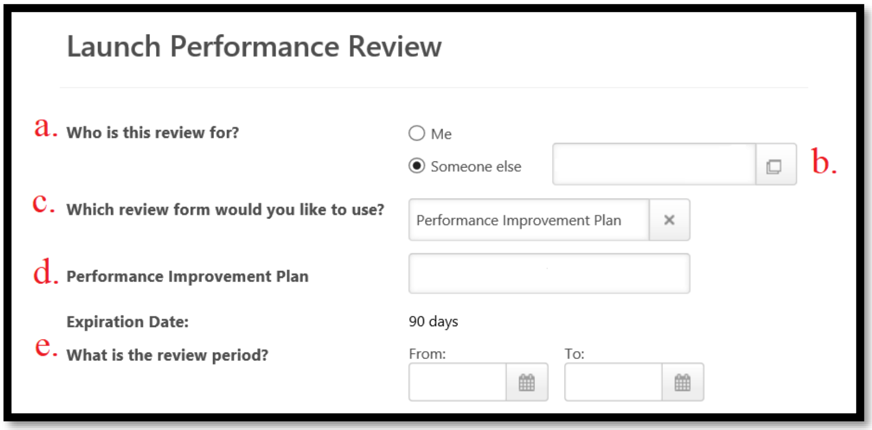


    d. Enter a title for the review. Example: PIP for (employee name)

e. What is the Review period?

From = **Today's date**

To = **Ninety (90) days after launch date**



5. The Performance Improvement Plan Task will appear in your Performance Review Summary page or as a task in your actions. From the Performance Review Summary page, select **Complete Performance Improvement Plan.**

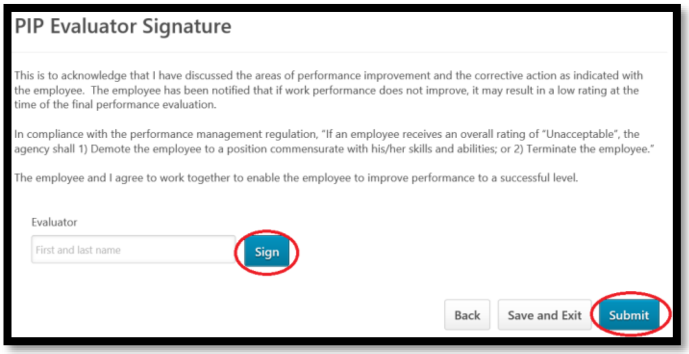
6. Each task will start with an overview, please read the Performance Improvement Plan overview carefully and select **Get Started**.

7. **PIP Agency HR Involvement**- Confirm that you have notified your agency HR representative and discussed the Performance Improvement Plan. Select **Save and Continue. You should consult with the employee prior to launching a PIP; an email notification should not be the employees first notice of a corrective action.**

8. **PIP Performance Improvement Areas-** Review the instructions and enter the required comment for the specific areas, which need improvement.

9. **PIP Corrective Actions**- Review the instructions and enter the required comment on how the employee can meet expectations in their position and what resources will be provided to assist the employee. Select **Save and Continue**.

10. **PIP Evaluator Signature**- This is to acknowledge that you have discussed with the employee. Enter your name and select **Sign** then select **Submit**. This will automatically follow step progression and advance the Performance Improvement Plan to the next line supervisor.



Evaluator Initial Follow up

1. After employee acknowledgment, the Performance Improvement Plan will automatically follow step progression and return to your action items as a Due Later task. This task is due thirty (30) days after the employee completed the acknowledgment step. You can make comments on the employee's progress throughout the thirty (30) days or you can wait until the step due date.

2. Select **Launch** to start the Initial Follow Up step in your action items in MyPURPOSE.

3. Each task will start with an overview, please read the Performance Improvement Plan overview carefully and select **Get Started**.

4. **PIP Agency HR Involvement**- This is to confirm that you have notified your agency HR representative, select **Next**.

5. **PIP Performance Improvement Areas**- Review the instructions and your comments on specific areas that the employee needed to improve on. This section is read only, select **Save and Continue**.

6. **PIP Corrective Actions**- Review the instructions and your comments on how the employee can meet expectations in their position and what resources you committed to provide to assist the employee. This section is read only, select **Save and Continue**.

7. **PIP Outcome**- Review the instructions and enter your comments regarding the employee's performance within the last thirty (30) days. Select **Save and Continue**.

   *If you are adding comments throughout the thirty (30) days, select **Save and Exit**.

8. **<u>PIP Evaluator Signature</u>**- This is to acknowledge that you have discussed with the employee. Enter your name and select **Sign** then select **Submit**. This will automatically follow step progression and route to the employee.

<u>Evaluator Additional Follow-up</u>

1. After employee acknowledgment of the initial follow up, the Performance Improvement Plan will automatically follow step progression and return to your action items as a Due Later task. This task is due thirty (30) days after the employee completed the acknowledgment step. You can make comments on the employees progress throughout the next thirty (30) days or you can wait until the step due date.

2. Select **Launch** to start to Initial Follow up step in your action items in MyPURPOSE.

3. Each task will start with an overview, please read the Performance Improvement Plan overview carefully and select **Get Started**.

4. **<u>PIP Agency HR Involvement</u>**- This is to confirm that your agency HR representative has been notified, select **Next**.

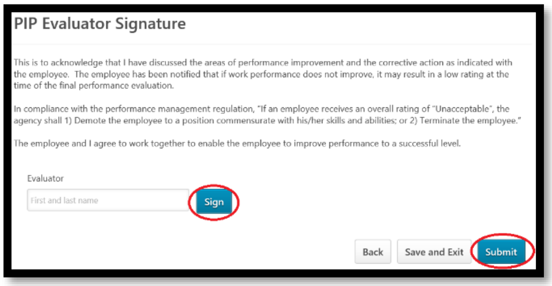
5. **<u>PIP Performance Improvement Areas</u>-** Review the instructions and your comments on specific areas that the employee needed to improve on. This section is read only, select **Save and Continue**.

6. **<u>PIP Corrective Actions</u>**- Review the instructions and your comments on how the employee can meet expectations in their position and what resources you committed to provide to assist the employee. This section is read only, select **Save and Continue**.

7. **<u>PIP Outcome</u>**- Review the instructions and your comments regarding the employee's performance for initial follow-up. Add comments regarding the employees performance within the last thirty (30) days. Select **Save and Continue**.

   *If you are adding comments throughout the thirty (30) days, select **Save and Exit**.

8. **<u>PIP Evaluator Signature</u>**- This is to acknowledge that you have discussed with the employee. Enter your name and select **Sign** then select **Submit**. This will automatically follow step progression and route to the employee.



*If the employee still needs additional corrective action, you may launch a new PIP.

Next Line Supervisor

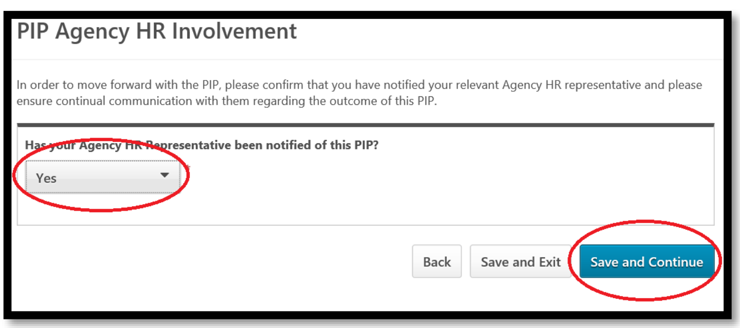
1. From the MyPURPOSE home screen, select the Performance tile.

2. Select MyPerformance (Actions/Request).

3. You will have a task for the employee who is being placed on a Performance Improvement Plan. Select **Launch** next to the task.

4. Each task will start with an overview, please read the Performance Improvement Plan overview carefully and select **Get Started**.

5. **<u>PIP Agency HR Involvement</u>**- Confirm that you have notified your agency HR representative. **Select Save and Continue.**

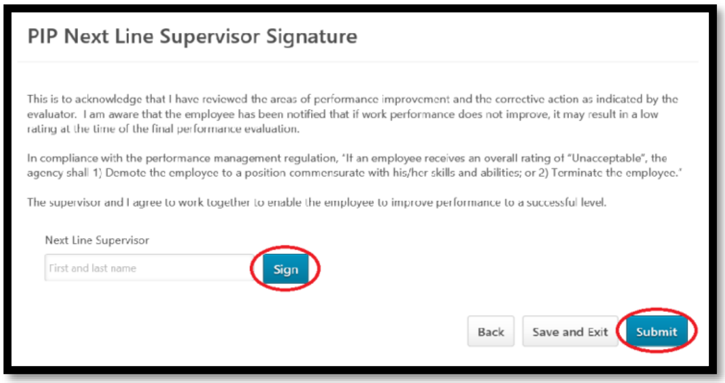


6. **<u>PIP Performance Improvement Areas</u>**- This section is read only, comments from the evaluator on specific areas which need improvement are visible. Select **Save and Continue**.

7. **PIP Corrective Actions**- This section is read only, comments from the evaluator on how the employee can meet expectations in their position and what resources will be provided to assist the employee. **Select Save and Continue**.

8. **PIP Evaluator Signature**- This is to confirm that the evaluator has discussed with the employee. Select **Save and Continue**.

9. **PIP Next Line Supervisor Signature**- This is to acknowledge that you have reviewed the Performance Improvement Plan and agree to work together with the evaluator to enable the employee to improve their performance. Enter your name and select **Sign** then select **Submit**. This will automatically follow step progression and advance the Performance Improvement Plan to the employee.



Employee

1. From the MyPURPOSE home screen, select the Performance tile.

2. Select MyPerformance (Actions/Request).

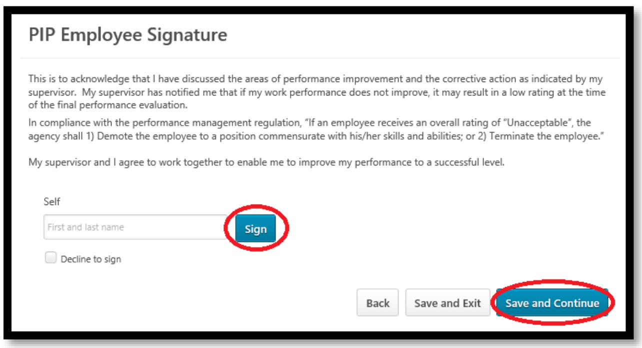
3. You will have a task for your Self Review for the Performance Improvement Plan. Select **Launch** next to the task.

4. Each task will start with an overview, please read the Performance Improvement Plan overview carefully and select **Get Started**.

5. **<u>PIP Performance Improvement Areas</u>-** This section is read only, comments from the evaluator on specific areas which need improvement can be viewed. Select **Save and Continue**.

6. **<u>PIP Corrective Actions</u>**- This section is read only, comments from the evaluator on how you can meet expectations in your position and what resources will be provided to assist. Select **Save and Continue**.

7. **<u>PIP Employee Signature</u>**- This is to acknowledge that you have discussed your Performance Improvement Plan with your evaluator. Enter your name and select **Sign** then select **Save and Continue**.



*Note, if the employee chooses to select "Decline To Sign", the Preformance Improvement Plan still remains in the employee file.

8. **<u>PIP Evaluator Signature</u>**- This is to confirm that your evaluator has discussed your Performance Improvement Plan with you. Select **Save and Continue**.

9. **<u>PIP Next Line Supervisor Signature</u>**- This is to confirm that your next line supervisor has reviewed your Performance Improvement Plan and agrees to work together with your evaluator to enable you to improve your performance. Select **Submit**. This will automatically follow step progression and route back to the evaluator for comments on the initial follow up, thirty (30) days after you have signed the Performance Improvement Plan.

Employee Acknowledgment to Initial Follow-up

1. After you and your evaluator have met and discussed your Performance Improvement Plan and your progress within the last thirty (30) days, the task will return to your action items in MyPURPOSE, select **Launch**.

2. Each task will start with an overview, please read the Performance Improvement Plan overview carefully and select **Get Started**.
3. **PIP Next Line Supervisor Signature-** This screen is to verify the next line supervisor has acknowledgment of the Performance Improvement Plan. Select **Save and Continue.**
4. **PIP Performance Improvement Areas-** Review the instructions and review comments left by your evaluator on specific areas that you need to improve on. This section is read only, select **Save and Continue**.
5. **PIP Corrective Actions**- Review the instructions and comments from your evaluator on how you can meet expectations in your position and what resources your evaluator committed to provide you. This section is read only, select **Save and Continue**.
6. **PIP Outcome**- Review the instructions and comments left by your evaluator regarding your performance within the last thirty (30) days. Select **Save and Continue**.
7. **PIP Employee Signature**- This is to acknowledge that you have discussed your performance with your evaluator. Enter your name and select **Sign** then select **Save and Continue**.
8. **PIP Evaluator Signature**- This screen is to verify the evaluator's acknowledgment. Select **Submit**. The task will automatically follow step progression and route back to your evaluator for additional follow up in thirty (30) days.

Employee Acknowledgment to Additional Follow-up

1. After you and your evaluator have met and discussed your Performance Improvement Plan and your progress within the last sixty (60) days, the task will return to your action items in MyPURPOSE, select **Launch**.
2. Each task will start with an overview, please read the Performance Improvement Plan overview carefully and select **Get Started**.
3. **PIP Next Line Supervisor Signature-** This screen is to verify the next line supervisor has acknowledgment of the Performance Improvement Plan. Select **Save and Continue**
4. **PIP Performance Improvement Areas-** Review the instructions and review comments left by your evaluator on specific areas that you need to improve on. This section is read only, select **Save and Continue**.

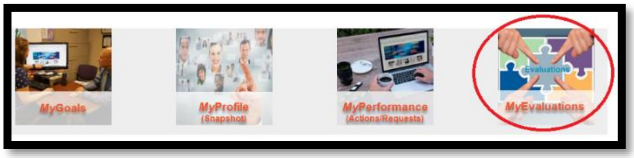
5. **PIP Corrective Actions**- Review the instructions and comments from your evaluator on how you can meet expectations in your position and what resources your evaluator committed to provide you. This section is read only, select **Save and Continue**.
6. **PIP Outcome**- Review the instructions and the comments left by your evaluator regarding your performance within the last sixty (60) days. Select **Save and Continue**.
7. **PIP Employee Signature**- This is to acknowledge that you have discussed your performance with your evaluator. Enter your name and select **Sign** then select **Save and Continue**.
8. **PIP Evaluator Signature**- This screen is to verify the evaluator's acknowledgment. Select **Submit**.

Exporting your Evaluation to PDF

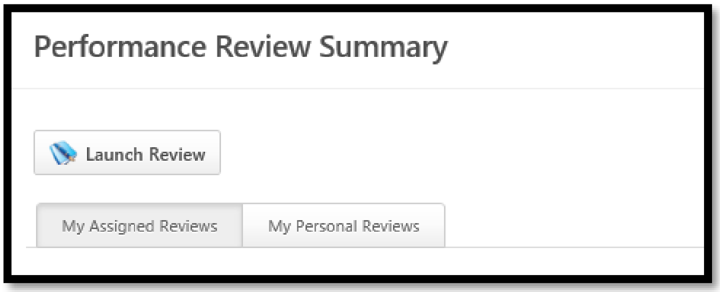
Follow the steps below to obtain a PDF version of your evaluation.

1. From the MyPURPOSE home screen, select the Performance tile.

2. Select MyEvaluations.



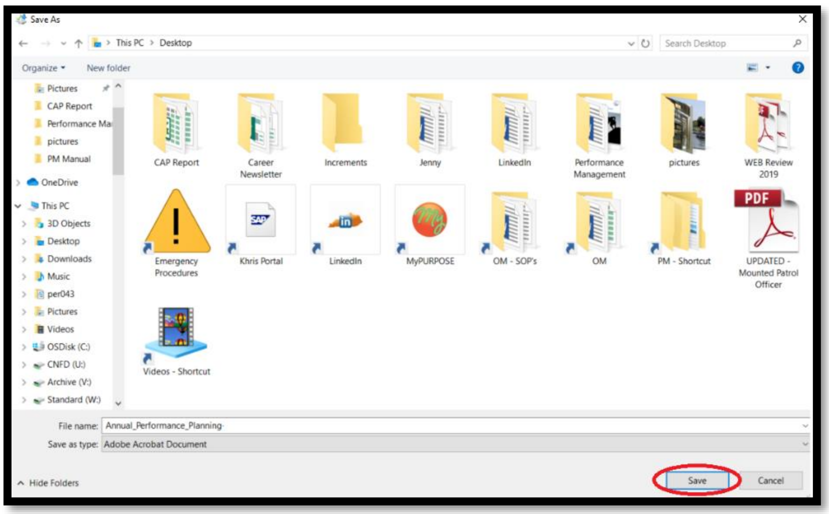
3. Within your Performance Review Summary page select **My Personal Reviews**.



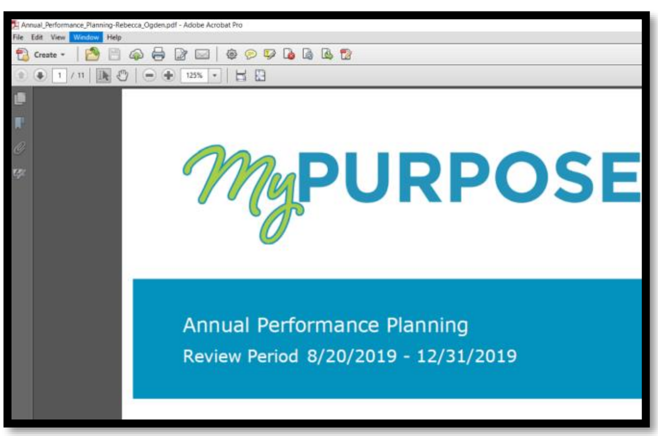
4. Select the portion of your evaluation you wish to save in PDF and/or print.

5. At the bottom of your screen you will see a pop up asking you if you would like to save or open. Select the dropdown next to **Save** and select **Save As.**

6. Choose the location on your computer to save the document and select **Save**.



7. Retrieve the PDF document from its saved location. You can now print the PDF document if needed.



Assigning Goals and Tasks to multiple team members

If you have multiple employees that report to you who will have the same goals and tasks, follow these steps to assign goals to them all at one time from the Team Goals page.

Goals created here will feed into their Annual Performance Plan, as long as the performance review date and goal dates align.

It is important to remember any edits to these goals should be made from the Team Goals page. The information from the Team Goals will feed into the employees performance review.

If corrections are made to goals within a performance review, that were created originally from the Team Goals page, the evaluator will need to “Approve” these edits from the Team Goals page before they reflect in the performance review. If edits are not approved the goal status will show as “Pending Goal Modification/Road Block”.

You may also notice that all employees who report to you will appear under your Team Goals Tab within MyGoals. Only performance eligible employees will have a performance review task and require goals.

1. From the MyPURPOSE home screen, select the Performance tile.

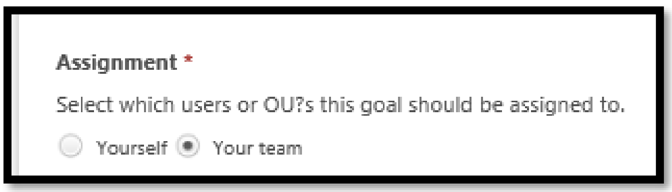
2. Select MyGoals.

3. From the MyGoals page, select **Team Goals** then **Create**.

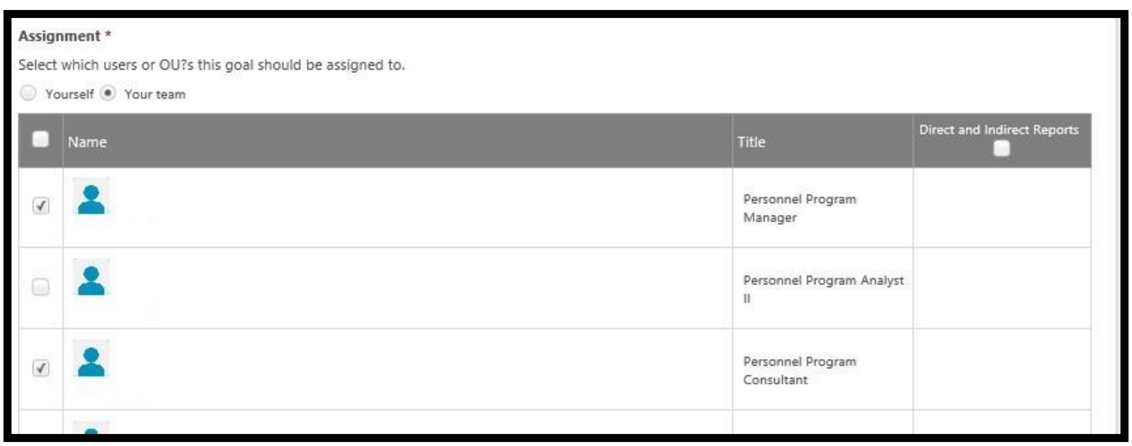
4. Create the goal and assign 1-3 tasks.

   *See the Evaluator's Annual Performance Planning section to create goals.

5. At the bottom of the Create Goals page under assignment, select **Your Team.**



6. A list of all your employees who report to you will appear. Please select each employee(s) you would like to assign the goal to and select **Submit.**



Once the Annual Performance Plan is launched, MyPURPOSE will automatically populate the goals and tasks in the plan for the employees you selected.

Continued Goal Modification

The evaluator and the employee has the ability to leave comments throughout the year on goals.

1. From the MyPURPOSE home screen, select the Performance tile.

2. Select MyGoals.

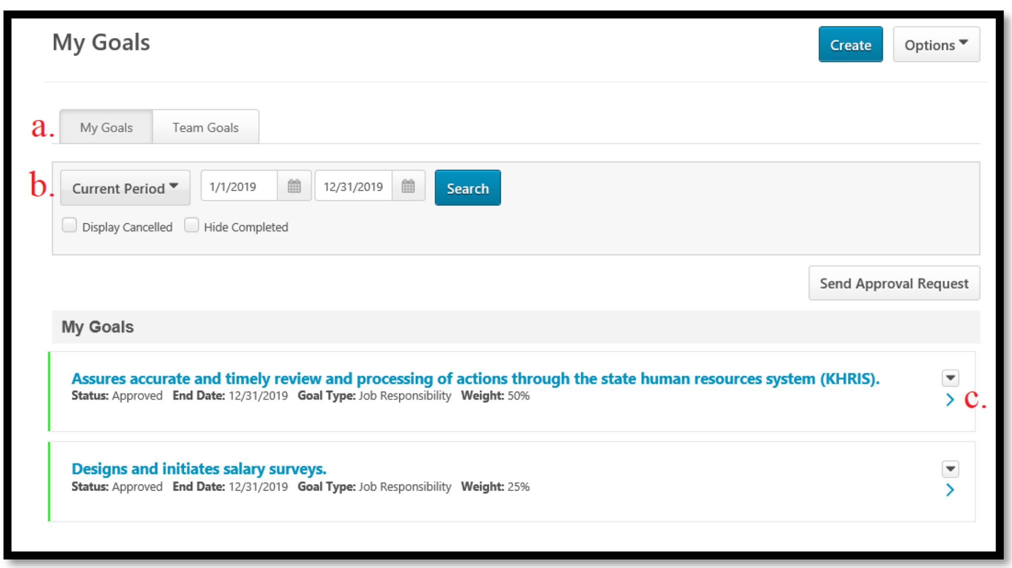
3. To add a comment:

Employee:

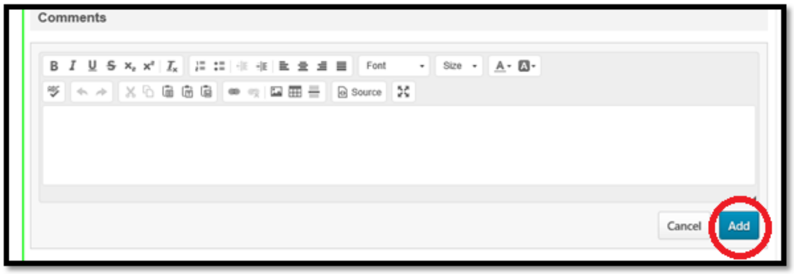
a. From the My Goals page select the **My Goals** tab.

b. Validate the review period.

c. Select the radio button beside the goal you wish to comment on to expand the goal description and tasks.



d. Select **Add Comment** and provide a comment that pertains to the selected goal within the comment box, select **Add.**

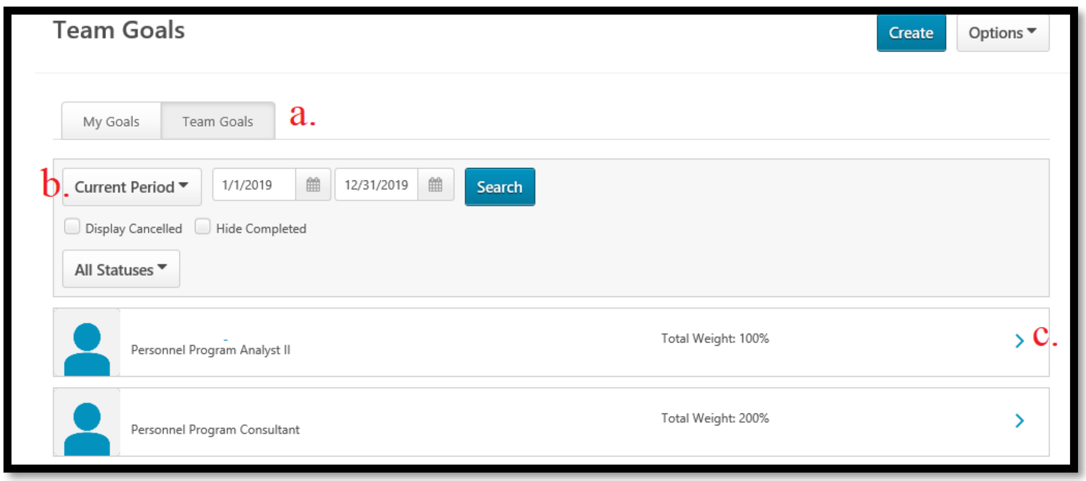


Evaluator:

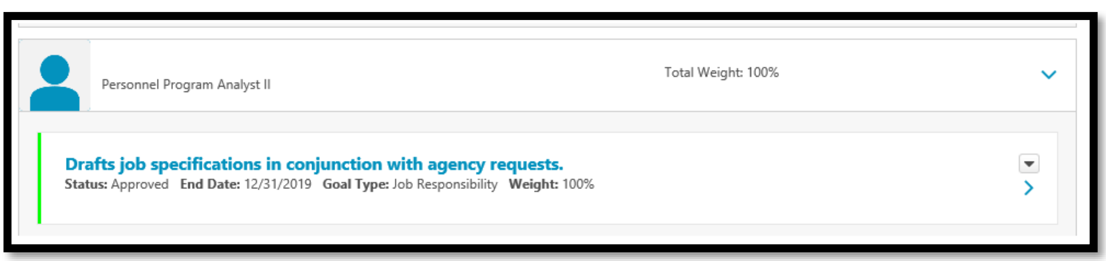
a. From the My Goals Page select the **Team Goals** tab.

b. Validate the review period.

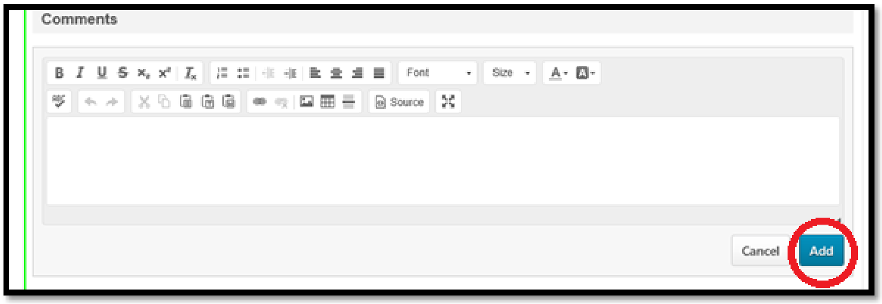
c. To view the goals associated with the employee select the radio button next to the employee.



d. Select the radio button next to the goal you wish to comment on.



e. Select **Add Comment** and provide a comment that pertains to the selected goal within the comment box. Select **Add.**



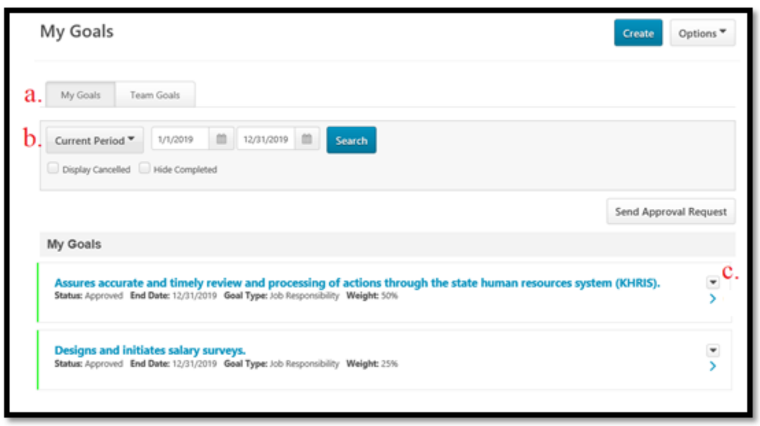
4. To modify an existing goal:

Employee:

a. From the My Goals select the **My Goals** tab.

b. Validate the review period.

c. Select the drop down option beside the goal you wish to modify and select **Edit**.



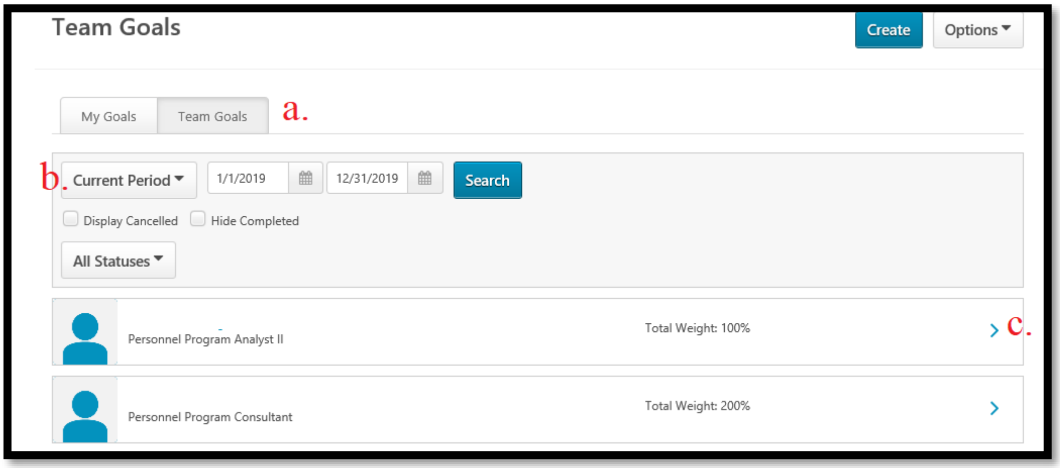
d. Make any edits to the goal and select **Submit**. The edit will automatically route and send an e-mail notification to your evaluator for approval.

<u>Evaluator:</u>

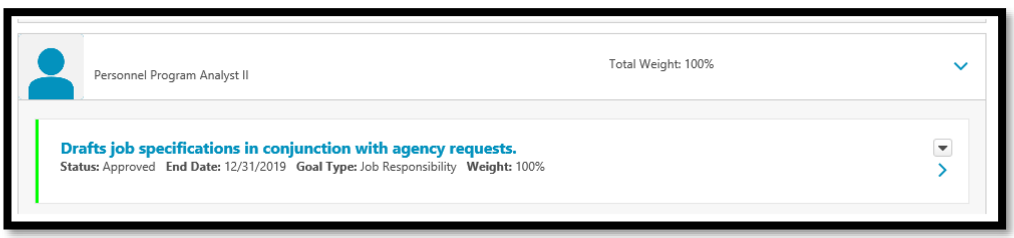
a. From the My Goals Page select the **Team Goals** tab.

b. Validate the review period.

c. To view the goals associated with the employee select the radio button next to the employee.



d. Select the drop down option beside the goal you wish to modify and select **Edit**.



e. Make any edits to the goal and select **Submit**. An e-mail notification will be sent to the employee to notify them that a goal has been modified.

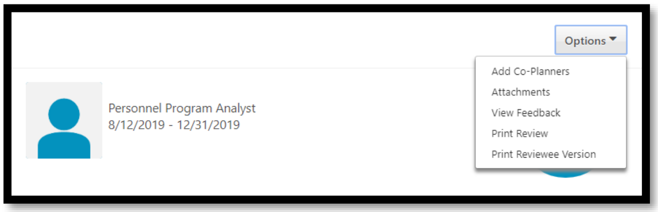
f. The evaluator should notify the employee of changes to their goals and request that they vist the MyGOALS page to review and comment to acknowledge the change.

Adding a Co-Planner

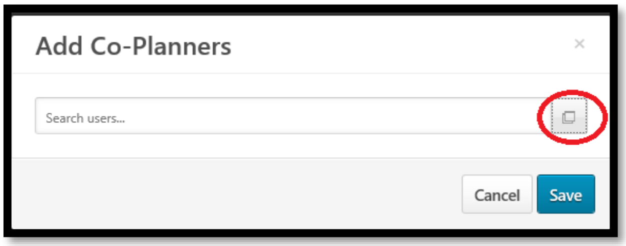
The evaluator should be the one to submit tasks during the Annual Performance Planning, Mid-Year Interim Review or the Year-End Interim/Final Performance Evaluation. However, the evaluator has the option to add a Co-Planner to an employee's review if deemed necessary. If a Co-Planner is added, it is important to note that both the evaluator and the Co-Planner will see all assigned tasks for the employee. Communication is imperative so that both individuals are not attempting to complete the same task for an employee.

If you have questions on when it is appropriate to add a co-planner reach out to your Performance Management Administrator.

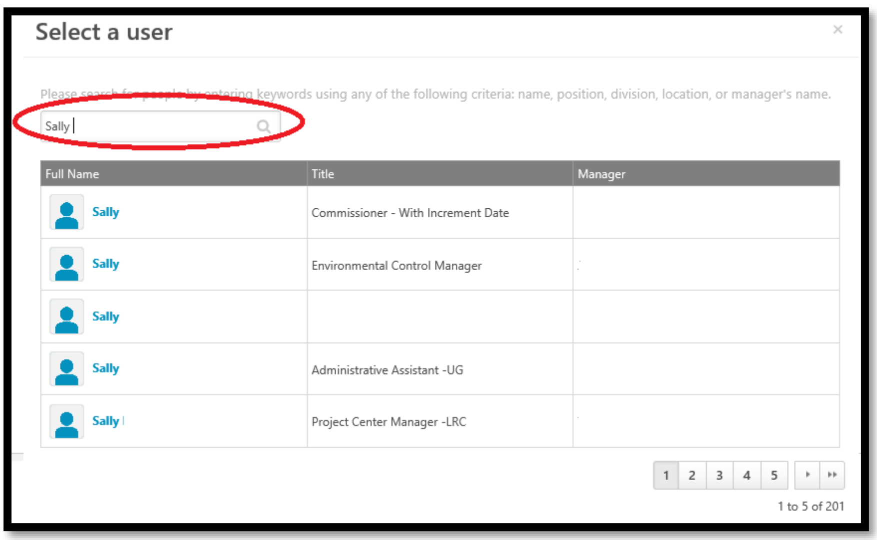
1. To add a Co-Planner select the dropdown labeled **Options** on the right hand side of your screen and select **Add Co-Planners**.



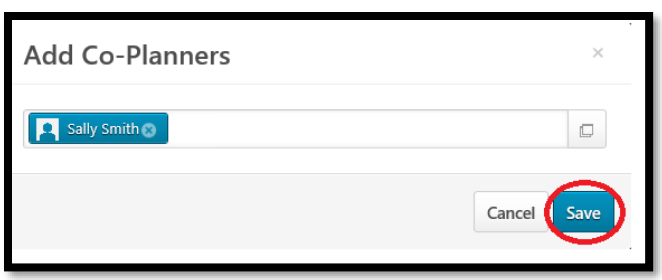
2. Select the search icon to select a co-planner.



3. Enter the Co-Planners name into the search field and key enter.



4. Select on the Co-Planners name and select **SAVE**.



You have now successfully added a co-planner.

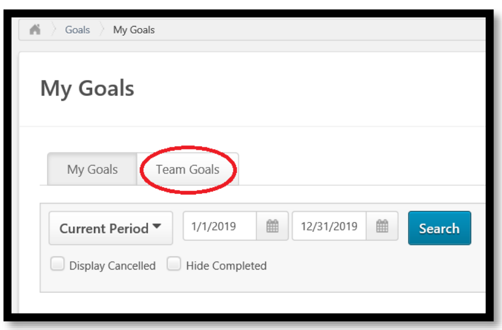
Copying/Advancing Goals From One Review Period To The Next

It is always best practice to review and update an employee's goals each review period. However, there are times when an employee's goal(s) could remain the same from one review period to the next. Follow the steps below to copy or advance employee goals to the new review period.

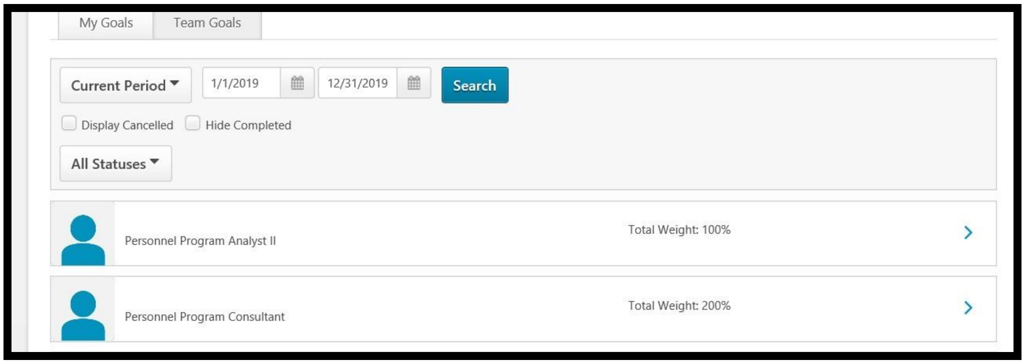
1. From the MyPURPOSE home screen, select the Performance tile.

2. Select MyGoals.

3. From the MyGoals page, select **Team Goals.**

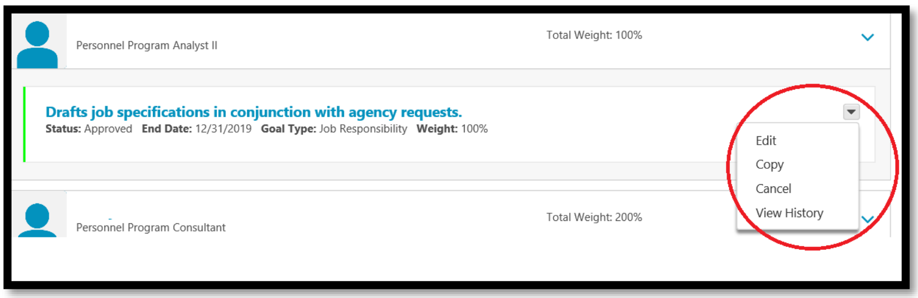


4. Validate the review period and select the radio button next to the employee whose goals you would like to copy/advance.

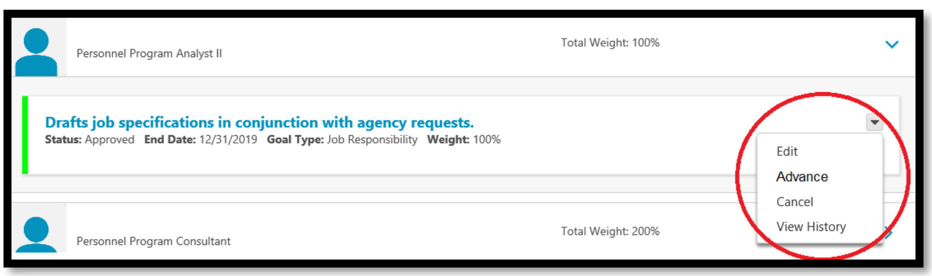


Select the drop down next to the goal you wish to copy/advance to the next Annual Performance Plan.

a. If you are copying/advancing goals prior to December 31st, select **Copy**.

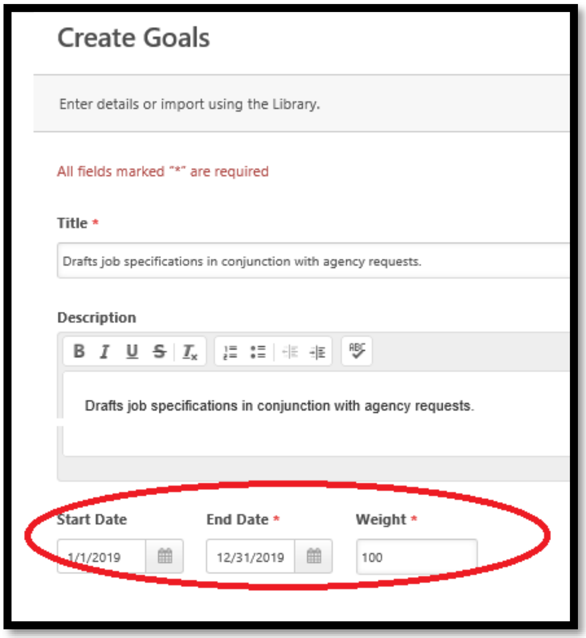


b. If you are copying/advancing goals after January 1st, select **Advance.**



5. On the Create Goals page update the start and end date for both the goal and tasks with the appropriate review period.

6. If necessary, make change to the goal and/or tasks associated with the goal, select **Submit.**



You have successfully copied/advanced the employee's goal to the next Annual Performance Planning Review Period. Once the new Annual Performance Plan is launched, any goal that you have copied/advanced will prepopulate on the employee's Annual Performance Plan.

Reopen

Evaluators and next line supervisors have the ability to reopen step(s) during a performance review to a previous step. The reopen button is located at the bottom of the Overview Section of each task. Evaluators cannot reopen a step to themselves, they may reopen to the employee or to the next line supervisor. Next line supervisors may reopen to either the employee or the evaluator. A task may not be reopened twice, in other words if the next line supervisor reopens a step to the evaluator, the evaluator cannot reopen the step again. If you are having trouble reopening a step please contact your Performance Management Administrator.

When a step is reopened the task is visible to the user it is assigned to in workflow AND the user it is reopened to. In other words, the task will show in both users action/request list. **It is imperative that you communicate outside of the system when a task is reopened.**

When reopening a step it is important that you do not to submit the task, simply exit the screen. Anytime a step is reopened it is best practice to communicate outside of the system to those users it affects. When reopened, tasks will not workflow back through any step that has been completed. Below steps that have reopen capability are noted.

Annual Performance Plan Step Progression	Step Days	Additional Info
Evaluator Review	Required 10 days	Competencies are only editable during this step.
Self Review	Optional 5 days	
Evaluator Goal Review Confirmation	Required 3 days	Reopen to Employee
Next Line Supervisor Review	Required 5 days	Reopen to Evaluator or Employee
Evaluator Discussion and Acknowledgment	Required 5 days	Reopen to Employee or Next Line Supervisor
Employee Acknowledgment	Required 3 days	
		Compliance Date 1/31

Mid-Year Interim Review Step Progression	Step Days	Additional Info
Self Review	Optional 5 days	
Evaluator Review	Required 10 days	Reopen to Employee
Next Line Supervisor Review	Optional 5 days	Reopen to Evaluator or Employee
Evaluator Discussion and Acknowledgment	Required 5 days	Reopen to Employee or Next Line Supervisor
Employee Acknowledgment	Required 5 days	
		Compliance Date 7/31

Year-End Interim Review/Final Evaluation Step Progression	Step Days	Additional Info
Self Review	Optional 5 days	
Evaluator Review	Required 5 days	Reopen to Employee
Evaluator Discussion and Acknowledgment	Required 4 days	Reopen to Employee
Employee Acknowledgment	Required 2 days	
Evaluator Rating	Required 3 days	Reopen to Employee
Next Line Supervisor Review	Required 5 days	Reopen to Evaluator or Employee
Evaluator Discussion and Acknowledgment	Required 5 days	Reopen to Employee or Next Line Supervisor
Employee Acknowledgment	Required 2 days	
		Compliance Date 1/31

Editing Scenarios

For steps, assigned to you, that have not been submitted and changes need to be made, simply use your navigation buttons at the bottom of the task or select the task sections to the left to navigate to the area you need to make adjustments for.

For initial Evaluator Review steps that have need submitted to the employee for Self Review and edits need to be made. Reach out to your Performance Management Administrator to submit a business request to have the step reopened to you for edits. You will need to communicate to the employee outside of the system that you have requested the step be reopened. The employee will not see your adjustments until the reopen step has been submitted.

*If the task is assigned to the next line supervisor, they too can reopen the step for you.

To edit Competencies once the initial Evaluator Review step has submitted, please reach out go your Performance Management Administrator to submit a business request to have the step reopened to you for edits. Competencies can only be edited during the initial Evaluator Review step.

*If the task is assigned to the next line supervisor, they too can reopen the step for you.

If changes are identified during the Evaluator and Employee Discussion, please reach out to your Performance Management Administrator to submit a business request to have the step reopened to you for edits.

If a step is reopened to you to delete a comment from a competency/goal, you should delete the comment and add a new comment, if there is no new comment to add simply add a period (.) in the comment field to ensure the previous comment is deleted.