PROCESS FOR EMPLOYEES WITHOUT COMPUTER ACCESS

If your employee does not have access to a computer he/she can still be actively involved in managing his/her own performance. You can sit with the employee at your computer and make changes together or you can enter the employee's changes in the computer yourself. Another option is to have the employee work from a printed/hard copy of the document. (Step 5 in the above selection outlines instructions for printing the Document.)

The following are some of the changes you can make.

Step 1—Define Criteria
During the planning stage, provide the employee a copy of his/her performance plan and allow him/her to write his/her comments and ideas on the hard copy. Then, together you will decide what the final plan will look like. After that you can make the final changes to the plan.

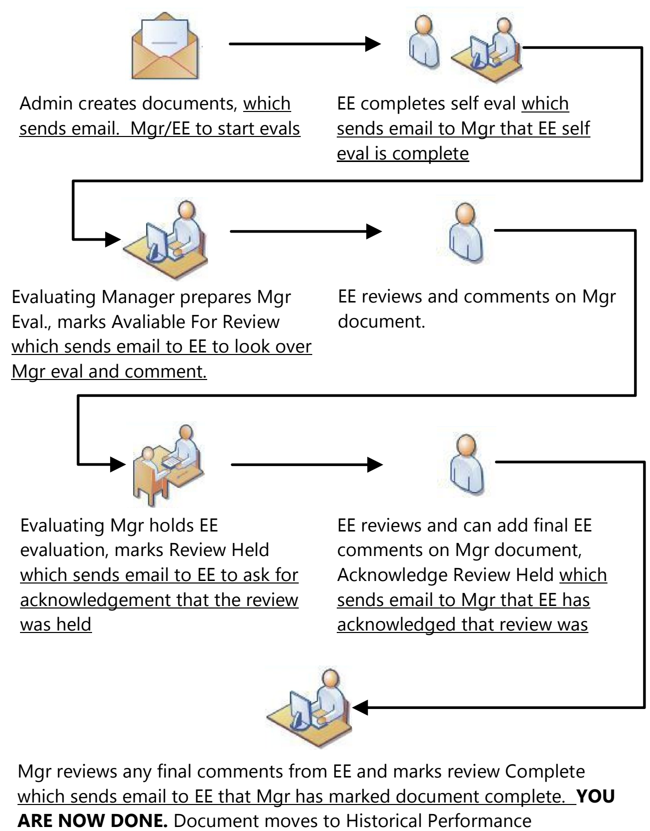
Step 2—Performance Notes
Employee should track their own performance notes in a separate paper file.

Step 3—Performance Evaluation
In order for the employee to complete his/her self-evaluation, you will need to give him/her access to your computer or have him/her complete the evaluation on a printed/hard copy of the plan.

Step 4—Finalize Performance Document
After meeting with your employee to discuss his/her performance evaluation, the employee will need to sign a hard copy of the evaluation or use your computer to acknowledge that his/her performance review was held.

Typical Workflow Process

Note: Process may differ between departments. Consult your manager for your specific process.



Rating Scale

Exceptional
Employee exceeded all performance expectations. Employee was an exceptional contributor to the success of his/her department and the State of North Dakota. He/she demonstrated role model behaviors.

Exceeds Expectations
Employee met all and exceeded most of the established performance expectations.

Meets Expectations
Employee met all performance expectations and may have exceeded some. Employee was a solid contributor to the success of his/her department and the State of North Dakota.

Needs Improvement
Employee met most, but failed to meet some performance expectations. Employee needs to further improve in one or more areas of expected job results or behavioral competencies.

Fails to Meet Expectations
Employee did not meet all or most of the established performance expectations. Employee needs significant improvement in critical areas of expected job results or behavioral competencies.

Not Rated
At the agency's discretion, a probationary employee may or may not receive a performance rating.

Rounding Rules

4.5—5.00 = Exceptional
3.5—4.49 = Exceeds Expectations
2.5—3.49 = Meets Expectations
1.5—2.49 = Needs Improvement
0.0—1.49 = Fails to Meet Expectations

Assistance

Please contact your assigned HR Officer for assistance.

North Dakota Performance Management Process

Manager System Job Aid

This information outlines the general steps a manager needs to take in PeopleSoft ePerformance to complete the different phases of the North Dakota Performance Management Process. (Your agency may have slightly different steps.)

Manager's Role

You will get an email indicating Performance Documents have been created. You can click the link in any PeopleSoft email,, log in and go to the specific task.

Step 1: Define Criteria
1. Collaborate with employee to determine the performance expectations (competencies, goals, and responsibilities) for the upcoming plan year.
2. Enter the plan into the ePerformance system and submit for approval (if required).

Step 2: Performance Notes
1. Throughout the plan year, enter performance notes (if desired) for your employees. Remember to discuss these notes with the employee at the time of occurrence. This helps keep track of accomplishments and issues throughout the performance timeframe.

Step 3: Performance Evaluation
1. Review the employee's self-evaluation (if available).
2. Complete your evaluation for the employee in the system.
3. Discuss and finalize the performance document with the employee.
   Note: The Mid Year (December - January) and Annual (July) evaluation steps will be the same.

Note: ePerformance is accessed through PeopleSoft Manager Hub/Team Performance or Employee Hub/my Performance

https://www.cnd.nd.gov/psp/strp/?cmd=login&errorPg=ckreq&languageCd=ENG

http://www.nd.gov/hrms/managers/talentmanagement.html

Step 1—Define Criteria
(if needed)

Action	Instruction
Log into PeopleSoft & click Manager Hub	To access screen: Team Performance ➤ Current Performance Documents
Choose Employee	Click **OMB Annual Eval W/Policies** on the same line as the desired employee.
Start Evaluation	Click **Expand All** to show all sections
Section 1: Competencies	Review statewide core competencies. These are pre-populated. There are 5 core Competencies and 2 leadership competencies. If the leadership competencies do not pre-load you need to add them into this section.
Add Competencies Enter Information Choose competencies Complete choice	Click on **Add Competency** Click **Search** without inserting any information. Click the desired boxes to add competencies. Click **Save Selected Competency**.
Delete	Click the Trash Can Icon under an individual competency to delete it. Click **Yes-Delete** to confirm delete.
Section 2: Responsibilities	Section is pre-populated for agencies on the statewide salary plan. You can add and delete responsibilities in this section.
Add Enter Information	Click **Add Responsibility**. Enter a **Title** and a **Description**. (Paste job duties from JDQ.) Click **Update**.
Delete	Click the Trash Can Icon under an individual responsibility to delete it. Click **Yes-Delete** to confirm delete.
Section 3: Individual Learning	Click **Refresh Button**. This will pull learning from ELM which occurred during the performance timeframe
Section 4: Basic Work Expectations	These are state specific or you may create your own.
Add Enter Information	Click **Add Item**. (Add your own) Enter a **Title**, **Description**, and any additional information. Click Update.
Delete	Click the Trash Can Icon under individual goal to delete them. Click **Yes-Delete** to confirm delete.
Complete Performance Plan	You may click **Save** if you wish to exit this phase to return later. OR You may click **Approve** to finish this step.

Step 2—Performance Notes

Action	Instruction
Log into PeopleSoft & click Manager Hub	To access screen: Team Performance ➤ Maintain Team Perf. Notes
Choose an employee Add a new note Enter note Complete the note	Select an Employee ID. Enter From/Through. Click **Add a new note**. Enter a subject and note text. Click **Save** to exit the note. (Saved will appear in the top right corner of screen.)

Step 3—Performance Evaluation

Action	Instruction
Log into PeopleSoft & click Manager Hub	To access screen: Team Performance ➤ Current Performance Documents
Review employee self-evaluation Review the document View	(if available) Click the **OMB Annual Eval W/Policies** link next to appropriate employee. Click Arrow next to **Review Self Evaluation** in left column. Click **View**
Complete Manager Evaluation	To access screen (if necessary): Team Performance ➤ Current Performance Documents Click the **OMB Annual Eval W/Policies** link next to appropriate employee. Click **Expand All** to show all sections
Enter Comments and Ratings (If peer or self evaluations have been conducted)	Enter comments in each comment box to justify ratings from the drop down lists for each competency, goal, and/or job responsibility. Click **Other Comments** to pull comments from other raters.
Section rating	Click **Calculate Ratings** to calculate the average rating for each section (no weighting applied). Be aware that the employee's average rating will also appear.
Calculate Overall Performance Rating	Click the **Calculate all Ratings** button to calculate the overall rating for the entire evaluation (based upon section ratings and weights). Rounding rules apply.
Check Language	Click the **Check Language** button.
Save	Click **Save** to save the document.
Mark Available for Review	Click **Share with Employee**. Employee will receive email to view & comment on manager document.

Step 4—Finalize Performance Document

Action	Instruction
Log into PeopleSoft and click Manager Hub	To access screen: Team Performance ➤ Current Performance Document
Choose employee	Click the **OMB Annual Eval W/Policies** next to the appropriate employee.
Performance Evaluation Meeting	Hold face-to-face meeting with employee to discuss the performance evaluation and ratings.
Enter the document Acknowledge review held Confirm	Click the **OMB Annual Eval W/Policies** next to the appropriate employee. Click the **Request Acknowledgment** link. Click **Confirm.** Employee will review and acknowledge meeting was held. Upon acknowledgement, email will be sent to the manager.
Complete Confirm Finish	Click the **OMB Annual Eval W/Policies** next to the appropriate employee. Click **Complete**. Click **Confirm**. The manager document is now in a status of complete & will automatically move to historical performance documents.

Step 5—Printing the Evaluation
(if needed)

Action	Instruction
Log into PeopleSoft & click Manager Hub	To access screen: Team Performance ➤ Current Performance Document
Access the document	Click the **OMB Annual Eval W/Policies** next to the appropriate employee.
Select the document you want to print	To print Manager Document: Click **Print** To print Employee Self Eval: Click Arrow next to **Review Self Evaluation** in left column. Click **View.** Click **Print**
Print Print Set Up Print the document	Click the Printer Icon. Click the following menu series: File ➤ Page Setup ➤ Landscape ➤ OK. Click File ➤ Print from the menu.