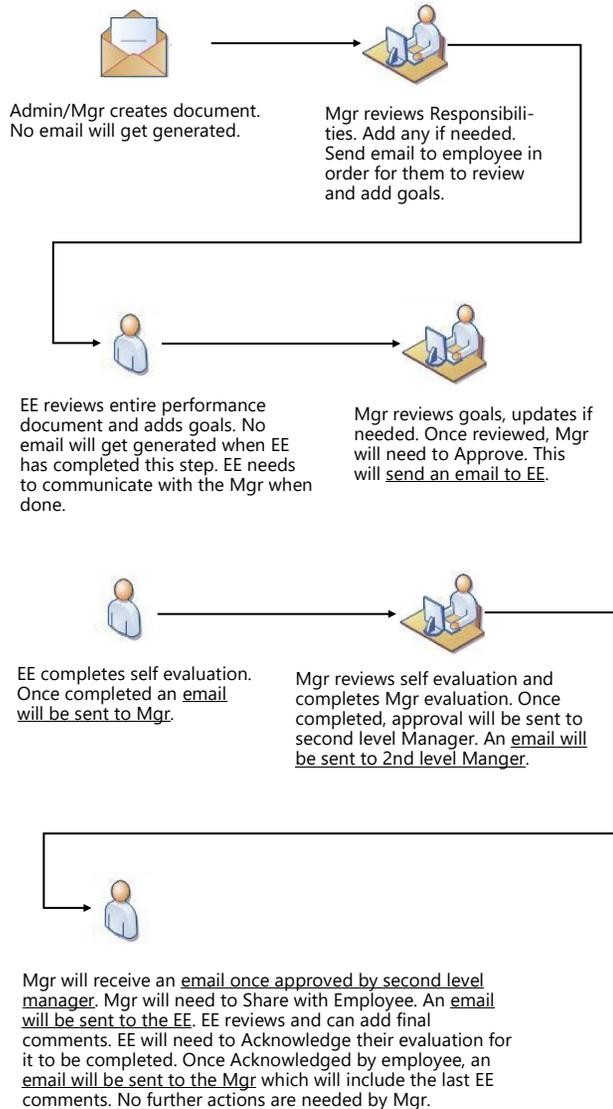


Typical Workflow Process

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



YOU ARE NOW DONE.

Completed documents will be available Team Performance > Historical Documents.

Rating Scale

Excels

Consistently delivers high impact outcomes; exceeds performance expectations and competencies routinely; produces outstanding results all the time.

Achieves

Job well done; performs in accordance with expectations; achieved performance goals and competencies.

Developing

Additional growth needed; achieving some goals, competencies and expectations but may be inconsistent or learning something new.

Needs Improvement

Needs improvement immediately; performance improvement plan to be developed.

Assistance

Please contact your assigned HR Officer for assistance.



Performance Management Process

Manager Job Aid

This information outlines the general steps a manager needs to take in PeopleSoft Performance to complete the different phases of the North Dakota Performance Management Process.

Manager's Role

In order to create and process the Performance Documents for your employees. Log into PeopleSoft and click on Team Performance located on the Manager Self Service page and look in Current Documents.

Step 1: Review Employee Performance Document

1. Once performance document has been created, review the Responsibilities section of your employee performance document. Add any Responsibilities if needed.
2. Communicate with the employee when they can add goals and review entire performance document.
3. Once employee has added goals and reviewed the performance document, manager needs to review goals and approve as well.

Step 2: Performance Notes

1. Throughout the review period, enter Performance Notes for your employee. Discuss any Performance Notes with the employee. The Performance Notes can be used to track accomplishments and opportunities throughout the review period.

Step 3: Review Manager Evaluation

1. Review employee's self-evaluation ratings. Review and add manager evaluation and comments.
2. Save and Submit to send to second level Manager for approval.
3. Once approved, Save and Share with Employee. Employee will need to acknowledge in order to complete performance review.

Note: ND Annual Performance is accessed through PeopleSoft Manager Self Service.

Step 1 - Creating Performance Evaluations (your agency may do this for you)

Action	Instruction
Log into PeopleSoft, Manager Self Service	
Create Performance Documents	To access: Team Performance > Current Documents Select Create Documents . Select employee or multiple employees. Select Continue .
Document Creation Details	Select employee(s) and create document. Enter Period Begin Date and Period End Date . Select Document Type and Template from drop down. Select Create .
Verify Responsibilities	Review created document by choosing Current Documents . Select on a document. Select Expand All . Review the Responsibilities to make sure they are added and are correct.

Step 2 - Review Goals

Action	Instruction
Log into PeopleSoft, Manager Self Service	
Define Criteria	To access: Team Performance > Current Documents Select an employee.
Review Goal Setting and Development Plan	Select Expand All . Review each goal. Click the Pencil Icon to edit each goal if needed.
Save	Click Save .
Complete Define Criteria	Click Approve . Employee will receive email to let them know this step has been approved.

Step 3 - Performance Notes

Action	Instruction
Log into PeopleSoft, Manager Self Service	
Maintain Team Performance Notes	To access: Team Performance > Maintain Team Perf. Notes Look up employee.
Add a Note	Click Add a New Note . Enter a subject and note text. The Subject could include the Month and Year. The Note Text should start with the date of when the performance note was created along with details of what was discussed.
Save Note	Click Save to exit the note.
Share Note	Send note to the employee.

Step 4 - Review Manager Evaluation

Action	Instruction
Log into PeopleSoft, Manager Self Service	
Review Manager Evaluation	To access: Team Performance > Current Performance Document
Enter Comments and Ratings	Select Expand All . Enter Manager comments. The Manager Comments help justify the ratings given.
Add Performance Notes	Select link Add Performance Notes in Section 4 and 8 comments in order to add performance notes created throughout the year.
Section 11 - Manager Comments	Add overall comments. Manager can access suggested writing tools by selecting Development Tips or Results Writer. These are used as a guide for the manager in order to promote thoughtful and meaningful comments based on the employee's rating and behavior.
Save and Submit for Approval	Click Save frequently. Click Complete to send to second level Manager for approval.
Share with Employee	Once approved by second level Manager, click Share with Employee . Employee will receive an email in order to acknowledge their document and any additional comments.
Performance Evaluation Meeting	Hold face-to-face meeting with employee to discuss and review their performance evaluation and ratings. (Performance review document can be displayed on screen or printed.)

Step 5 - Finalize Performance Evaluation Document

Action	Instruction
Log into PeopleSoft, Manager Self Service	
Review Manager Evaluation	To access: Team Performance > Current Performance Document Select an employee.
Completing the Performance Evaluation	After the face-to-face performance evaluation meeting, the employee will review, add any additional comments, Save and Acknowledge the evaluation. An email will be sent to the Manager once employee has Acknowledged the evaluation. <u>No further action is needed by the Manager</u> . The completed performance evaluation will now be located in Historical Documents.

Step 6 - Printing the Completed Evaluation (optional)

Action	Instruction
Log into PeopleSoft, Manager Self Service	To access: Team Performance > Historical Documents
Select the document	Select evaluation to print.
Print	Click the Printer Icon in the upper right hand corner. A printed version of the evaluation will appear. Click File > Print from the menu.