

Universal Annual Performance Management Process FAQs

Overview

This document provides detailed answers to some of the frequently asked questions (FAQs) regarding the new Universal Annual Performance Management Process in PeopleSoft. There are two sections of this document, one for questions asked by Managers and one for questions asked by employees. This is a living document, so you feel a question should be added, please let us know.

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Why is the State going to a single performance evaluation form?

The Cabinet HR Leadership Team was formed to discuss multiple opportunities for collaboration and improved consistency for employees across State agencies. One identified opportunity was the implementation of a single State performance evaluation form. During our conversations regarding evaluation forms, we found there were over 100 different evaluations forms used by State agencies. Some agencies alone had up to 10 different evaluations forms. To provide consistency among agencies, it was necessary to develop a single form that all agencies can use.

How does Pay for Performance work with this evaluation process?

The cycle of the performance evaluation process takes Pay for Performance into consideration so it works well with the new performance rating scale.

What is the new rating scale?

The rating scale has been updated to a new 4 level scale. The rankings are as follows:

- 1) **Excels** – *Consistently* delivers high impact outcomes; exceeds performance expectations and competencies *routinely*; produces outstanding results *all the time*.
- 2) **Achieves** – *Job well done*; performs in accordance with expectations; *achieved* performance goals and competencies.
- 3) **Developing** – Additional *growth needed*; achieving some goals, competencies and expectations but may be *inconsistent* or learning something new.
- 4) **Needs Improvement** – Needs *improvement* immediately; performance improvement plan to be *developed*.

Is there a numerical calculated rating like there was in the past?

No, the rating is not calculated like it was in the past

Are the competencies the same for all cabinet agencies?

Yes, they are the same for all cabinet agencies and will automatically be populated when the performance review document has been created. A list of the competencies are located at the bottom of the Talent Management webpage on the OMB website.

<https://www.nd.gov/omb/agency/state-government-human-resource-management/performance-management/talent-management>

Why can't I start my self-evaluation?

In order for you to start your self-evaluation, the manager must approve your goals for the current year. Once this has been completed, you should receive an automated system email stating your self-evaluation is ready for completion.

Some job descriptions are in JDQ and some are not, how does that impact the creating of the performance documents?

If you have job descriptions in JDQ the information currently entered will be pulled into the performance review document. It is recommended to have all JDQs updated prior to creating the performance document so it pulls in the current version of the job responsibilities.

If a JDQ was updated, the updated JDQ information will be available to pull into the performance document the next day.

If you need to adjust the content of an existing responsibility, one can be added to the performance document at any time manually. It is advised to always update the responsibilities in JDQ in order to carry forward those changes.

If there is no JDQ, the job responsibilities will need to be added to each performance document once it has been created.

What if my JDQ is wrong or missing?

If your JDQ has changed and your current duties are not reflected in the performance evaluation form; please contact Human Resources. Since PeopleSoft pulls the JDQ into the performance evaluation, Human Resources will help you delete your current evaluation, update your JDQ, and then recreate the performance document to ensure your JDQ is correct.

Although you can edit the JDQ in the evaluation while in the define criteria stage, it is not acceptable to do so. This is because editing your JDQ in the performance evaluation will only change your JDQ in the performance evaluation and not in the JDQ system. Therefore, your JDQ will continue to be incorrect.

Will the performance document be assigned by Reports To?

Yes.

If an employee changes positions during the year, should a new performance document be created?

Yes, their old document stays with their old manager. In most cases the old doc should be canceled by their old manager and a new doc should be created, in order to automatically link to their new manager.

Will the listing of all training from ELM be updated on the performance documents?

The manager and employee have the ability to select refresh on the performance document located in the Learning section in order to pull in the most current listing from ELM.

If I get interrupted from completing a step of the performance review process can I come back to it later and not lose what was entered?

Yes, make sure to select Save. It is always recommended to periodically select Save as you are editing the performance document in order to save any updates.

Can managers create new and delete performance documents?

The manager has the capability to create new performance document through Manager Self Service. The manager does not have access to delete performance documents that have been created. Each agency administrator can delete the performance documents.

What should be done if an employee doesn't agree with a rating on their performance document?

If an employee disagrees with their evaluation they should go to the next line supervisor to discuss the issue.

If I am a senior manager, can I see how other managers are doing on their performance reviews?

Yes, there is a direct reports pagelet that provides this status with a drill down option to see each Manager's status.

Can multiple performance documents exist for the same employee?

Yes, there can be. In order to create multiple performance documents the start and end dates of each document cannot be identical.

If an employee changes positions during the year, should a new performance document be created?

Yes. When creating a new performance the new job responsibilities for the new job will be loaded from JDQ if your agency uses JDQ or they can be manually added if the agency does not use JDQ.

What if I can't see all of my assigned staff or I'm missing a staff member? (Supervisor's only)

You may not be able to see all of your assigned staff because one of two things have occurred:

1. The system utilizes the "reports to" function in PeopleSoft. Therefore, if your assigned employees are currently reporting to another supervisor in PeopleSoft for various reasons, their performance documents will not be assigned the correct supervisor.
2. Contact HR and they will transfer the performance document accordingly.

Will the other review templates be updated later?

Only the annual performance review document has been updated at this time. The expectation is that the probationary performance documents will be updated as well.