

# User Guide for the Employee Performance Plan and Evaluation Application

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## Introduction

The Employee Performance Plan and Evaluation Application provides easy access to your performance information. The information is secured so that only you, your supervisor, and reviewer can access your performance information.

## Before you use the system

You can start using the system once you have an active account. Most employees will have accounts created for them by their direct supervisor.

You can create your own account if you are a supervisor who does not have your own performance evaluated. For more information, see *Self registration*.

All supervisors must create accounts for their direct reports if the employee is new. If the employee was transferred from another supervisor or judicial entity, contact Human Resources so they can transfer the account. Once the supervisor creates an account, the employee receives a registration email containing a link to a registration page. The registration page allows the employee to set up their own password and a reminder to help them reset their password in case they forget it.

Once you have registered, you can log in to the system. For more information, see *Logging in*.

Supervisors will also have to set up an association to each of the persons who will act as reviewers.

## Supervisor's account setup

If you are a supervisor and your performance is evaluated, then your supervisor will set up an account for you. For more information on activating your account, refer to *Employee's account setup – Activating your account*. If you are a supervisor and you do not have your performance evaluated you can self-register as described in the next section.

### ***Supervisor self-registration***

You can self register only if you are a supervisor who does not have your own performance evaluated. To self-register follow the steps below:

1. Visit the following address with your web browser:

<https://insideapps.nmcourts.gov/PerformancePlan/supregistration.jsf>

The Supervisor Registration page opens (see screen shot 1).

2. Complete all required fields.

The *Challenge Question* and *Challenge Answer* fields will help you in case you forget your password (For information on retrieving your password, see *Forgot password*).

3. In the *Challenge Question* field enter a question that only you are likely to know the answer.
4. In the *Challenge Answer* field enter an answer to this question.
5. If you will also be acting as a reviewer, check the “*I will also act as a reviewer*” check box.
6. Click **Submit**. A message appears notifying you if the registration was successful.
7. Once you have self registered you can log into the system. For more information on logging in, see *Logging in*.

## Supervisor Registration

Use this form **only if** you are a supervisor who does **not** have your own performance evaluated.

First name:	<input type="text"/>	*
Middle name:	<input type="text"/>	
Last name:	<input type="text"/>	*
Employee ID:	<input type="text"/>	*
Judicial entity:	<input type="text" value="-Select-"/>	*
Job title:	<input type="text" value="-Select-"/>	*
Hire date:	<input type="text"/>	*(format: MM/DD/YYYY)
Email:	<input type="text"/>	*
Password:	<input type="password"/>	*
Confirm password:	<input type="password"/>	*
Challenge question:	<input type="text"/>	*
Challenge answer:	<input type="text"/>	*
I will also act as a reviewer:	<input type="checkbox"/>	

*Screen Shot 1 – Supervisor registration screen*

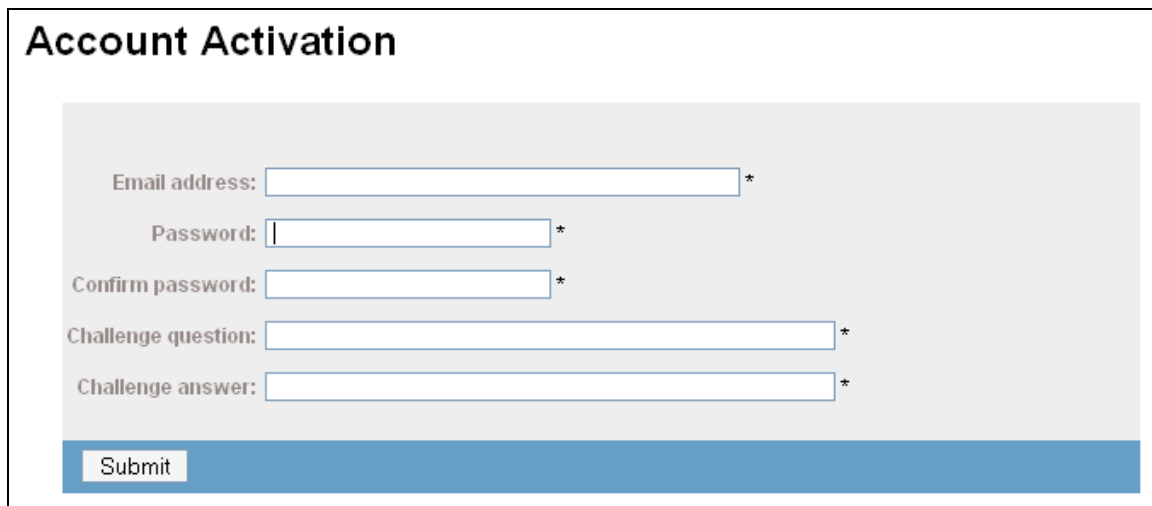
## Employee's account setup

This section describes the tasks an employee must perform in order to activate their account.

### *Activating your account*

If your supervisor set up an account for you, you will need to activate the account. However you will only need to do this once. After your supervisor has created your account you will receive an email with a link to an activation page. To activate your account follow these steps:

1. Click on the activation link in your email. The account activation page opens (See screen shot 2). If the link does not work, see the *Trouble shooting* section in this document.
2. In the *Email Address* field, enter your full email address.
3. In the *Password* field, type what you want your password to be.
4. In the *Confirm password* field, re-type the password you entered in step 3.
5. In the *Challenge question* field, enter a question that only you know the answer to.
6. In the *Challenge answer* field, enter an answer to the question you entered in step 5. If you forget your password in the future you can reset it by answering the challenge question.
7. Click **Submit**. A message appears notifying you if the activation was successful.



**Account Activation**

Email address:  \*

Password:  \*

Confirm password:  \*

Challenge question:  \*

Challenge answer:  \*

*Screen shot 2 – Account Activation Screen*

## Logging in

You can log in by visiting the following address with your web browser:

<http://inside.nmcourts.gov/PerformancePlan/>

To log into the system follow these steps:

1. From the login screen, enter your full email address in the *User name* field.
2. Enter your password.
3. Click **Submit**. If you have only the employee role, the main menu opens, otherwise:
  - a. If you have multiple roles in the system you are prompted to choose a role. Choose the role you want to work with and click **Submit**. If you did not choose the reviewer role, the main menu opens, otherwise:
  - b. If you choose the reviewer role and if
    - i. you have only one supervisor you can review, the main menu opens.
    - ii. you have multiple supervisors you can review, the system prompts you to choose a supervisor. Choose the supervisor and click **Submit**. The main menu opens.

## Automatic logout

After you have logged into the application it creates a login *session*. The session will become inactive if you are not actively working with the application for thirty minutes. This means that you will no longer be logged in. The application will warn you if you are inactive for twenty nine minutes and will ask you to save your work. If you do not save your work before the thirty minutes is up, some of your work may be lost.

## Forgotten password

If you have forgotten your password follow these steps:

1. Visit the following address with your web browser:  
<http://inside.nmcourts.gov/PerformancePlan/>  
The login screen opens.
2. Click **Forgot Password**. The *Forgot Password* screen opens.
3. Enter your email address and click **Submit**. The *Forgot Password* screen displays a message telling you to check your email.

**Important:** Be sure to enter the correct email address. The system **will not** warn you if you enter an incorrect email address.
4. Check your email, looking for the subject line “Forgot password for Employee Performance Plan and Evaluation.”

5. Click on the link in the forgotten password email. The *Forgot Password* screen displays the *Challenge question* you entered when you set up your account.
6. Enter the answer to the challenge question and click **Submit**.
  - a. If you enter the correct answer, you will receive an email with the subject line “Account reset for Employee Performance Plan and Evaluation.” This email contains instructions for completing the password reset.
  - b. You will have several chances to type the answer correctly. If you fail to answer the question correctly after several tries, you will be “locked out” and must contact the help desk to have your account reset.

## Supervisor’s tasks

This section describes the tasks that supervisors perform in the system. Your tasks include:

- Account creation and maintenance for your direct reports
- Maintaining list of your reviewers
- Maintaining your own custom competencies
- Maintaining templates
- Creating or updating plans and evaluations
- Commenting on plans

### *Creating a user account*

**Important:** Employee accounts should **only** be created once. If the employee is a transfer from another supervisor or judicial entity, contact Human Resources for assistance with transferring the account. If your employee’s name and/or email address changes **do not** create another account. Instead, edit the information on the existing account. For information on editing an existing account, refer to *Account Maintenance* section in this document.

To create an account for one of your direct reports follow these steps:

1. Log into the system and select the *Supervisor* role.
2. From the main menu under *Employee* click **Maintain**. The account maintenance screen opens displaying the employees you have created.
3. Click **Add**. The create employee screen opens. (See screen shot 3).
4. Enter the employee’s full email address. Be careful to enter this correctly as the system will send an account activation email to this person. If the email address is incorrect the employee will not get a notification.
5. Enter information in the name fields (the *Middle name* field is optional).

6. Enter the employee's SHARE ID.
7. Select the employee's job title.
8. Enter the date the employee was hired in *MM/DD/YYYY* format. For example: 03/15/2010.
9. If this employee is a supervisor check the "*Is supervisor*" check box.
10. If this employee is a reviewer check the "*Is reviewer*" check box. If you check this box you must also check the "*Is supervisor*" box.
11. Click **Submit**. The account is created and email sent to the employee.

### Employee Account

Email:  \*

First name:  \*

Middle name:

Last name:  \*

Employee ID:  \*

Job title:  \*

Hire date:  \* (format: MM/DD/YYYY)

Is supervisor:

Is reviewer:

*Screen shot 3 – Employee Account Screen*

### **Account maintenance**

You can edit the accounts of your direct reports. For example, you may need to do this due to a name or email address change. You can also force the system to resend an account registration email if your employee says he or she did not receive the email. If an employee gets locked out of their account, you can reset their account and allow them to create a new password.

**Important:** If an employee's email address changes **do not** create another account. Instead, edit the email address on the existing account.

To maintain accounts, follow these steps:

1. Log into the system and select the *Supervisor* role.
2. From the main menu under *Employee* click **Maintain**. The account maintenance screen opens displaying the employees you have created (See screen shot 4).
3. To edit, click **Edit** next to the employee whose account you want to edit. Edit is not available if the account has a status of *Unregistered*.
4. To re-send account registration email, click **Send email** next to the employee who you want to re-send a registration email.
5. To reset an employee's account if they have forgotten their password, click **Reset**.
6. Click **Cancel** to return the main menu.

Account Maintenance									
Add									
Last Name	Middle Name	First Name	Email	Status	Employee ID	Edit	Re-register	Reset	
Boston	Lynn	Sebene	sboston@nmcourts.gov	Active	000000	Edit		Reset	
Buddy		David	acbrien@nmcourts.gov	Needs reset	314793			Reset	
Cancel									

*Screen shot 4 – Account maintenance screen*

### **Maintaining reviewers**

Reviewers review the plans and evaluations you create for your employees. A reviewer is typically a supervisor that works in the same judicial entity as you do, however the system allows you to select reviewers from other judicial entities. You may have one or more reviewers. By telling the system who you reviewer(s) are, you are giving access to those people who can review and/or edit the plans and evaluations you have created for your employees.

### **Adding a reviewer**

To add a reviewer, follow these steps:

1. Log into the system and select the *Supervisor* role.
2. From the main menu under *Reviewers* click **Maintain**. The *Maintain Reviewers* screen opens.
3. Click **Add**. The *Add Reviewer* screen opens (see screen shot 5).
4. Click the letter of the last name of your reviewer. The reviewers that match appear in the list.
5. If you wish to select a reviewer from outside your judicial entity, check the **Expand List** checkbox and then repeat step 4.
6. Find the reviewer in the list and click **Add**. The *Maintain Reviewers* screen opens displaying the reviewer you added (see screen shot 6). Notice that the last column on this screen has a *Remove* link.
7. To return to the main menu click **Cancel**.

**Add Reviewer**

Click the first letter of the last name of a reviewer you want to add. Potential reviewer names show up in the list below. Click **Add** next to the reviewer you want to add.

If you are not finding the reviewer you want, you can expand the list of available reviewers. Expand list

First letter of last name: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Last Name	Middle Name	First Name	Employee ID	Add
Sanchez		Eva	114734	Add
Sanchez	B	Charles	124000	Add

*Screen shot 5 – Add Reviewer screen*

**Maintain Reviewers**

Add

Last Name	Middle Name	First Name	Employee ID	Remove
Prisoc		Steve	828282	Remove

Cancel

*Screen shot 6 – Maintain Reviewers screen*

### **Removing a reviewer**

To remove a reviewer, follow these steps:

1. Log into the system and select the *Supervisor* role.
2. From the main menu under *Reviewers* click **Maintain**. The *Maintain Reviewers* screen opens (see screen shot 6).
3. Click **Remove** next to the reviewer you want to remove. The reviewer is removed from the list.
4. To return to the main menu click **Cancel**.

### **Maintaining competencies**

Competencies are predefined or custom defined goals that you can add to tasks in an employee's plan. The system allows you to create your own custom defined competency list.

### **Creating a custom competency**

To create a custom competency, follow these steps:

1. Log into the system and select the *Supervisor* role.
2. From the main menu under *Competencies* click **Maintain**. The *Maintain Competencies* screen opens (see screen shot 7).
3. Click **Add**. The *Custom Competency* screen opens (see screen shot 8).
4. In the *Term* field, enter the name of the competency.
5. In the *Definition* field, enter the definition of the competency.

6. Click **Submit**. The *Maintain Competencies* screen opens and your new term is shown in the list.
7. To return to the main menu click **Cancel**.

Maintain Competencies			
Add			
Term	Definition	Active	Edit Delete
Lorem Ipsum	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nam congue, erat sed feugiat mattis, elit nibh lobortis felis, sit amet porttitor velit est vitae purus. Phasellus volutpat ante sed est convallis eleifend. Nulla facilisi. Aliquam molestie adipiscing ante nec semper. Praesent dictum tristique porttitor. Vivamus sagittis, turpis et viverra condimentum, est ligula dapibus orci, quis porttitor est augue id nisl. Nullam erat mi, volutpat nec euismod sit amet, elementum sit amet quam.	true	Edit Delete
Praesent ac interdum	Nam dictum accumsan consequat. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Pellentesque quis dui sapien. Sed venenatis metus et nisi adipiscing ornare. Praesent sed ipsum tellus, non bibendum eros. Praesent ac interdum elit. Nullam convallis pharetra turpis, et dictum dolor vehicula nec. In tortor neque, gravida non feugiat a, pharetra sit amet felis. Sed vel pellentesque elit. Sed rhoncus sapien quis velit posuere et porta risus gravida. Praesent lacus nisl, tempus eu lacinia ut, suscipit et eros. Praesent ipsum neque, aliquet posuere commodo et, rutrum at sem.	true	Edit Delete

Cancel

*Screen shot 7 – Maintain Competencies screen*

Custom Competency	
Term:	<input type="text" value="Lorem Ipsum"/>
Definition:	<p>           Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nam congue, erat sed feugiat mattis, elit nibh lobortis felis, sit amet porttitor velit est vitae purus. Phasellus volutpat ante sed est convallis eleifend. Nulla facilisi. Aliquam molestie adipiscing ante nec semper. Praesent dictum tristique porttitor. Vivamus sagittis, turpis et viverra condimentum, est ligula dapibus orci, quis porttitor est augue id nisl. Nullam erat mi, volutpat nec euismod sit amet, elementum sit amet quam.         </p>
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>	

*Screen shot 8 – Custom Competency screen (create mode)*

### Editing a custom competency

To update a custom competency follow these steps:

1. Log into the system and select the *Supervisor* role.
2. From the main menu under *Competencies* click **Maintain**. The *Maintain Competencies* screen opens.
3. Click **Edit** next to the competency you want to change. The *Custom Competency* screen opens in edit mode (see screen shot 8-A).

4. You can edit the term or definition fields or change the active status. Inactive competencies are not shown in drop-down lists.
5. Click **Submit**. The *Maintain Competencies* screen opens and your changes are reflected in the list.
6. To return to the main menu click **Cancel**.

### **Deleting a custom competency**

You can delete a custom competency only if it has not been used in any plan. If you attempt to delete a custom competency that is used in a plan or evaluation you will get an error message similar to the following: “*DataIntegrityException: Cannot delete competency, it is referenced by a plan*”.

To delete a custom competency follow the steps below:

1. Log into the system and select the *Supervisor* role.
2. From the main menu under *Competencies* click **Maintain**. The *Maintain Competencies* screen opens (see screen shot 7).
3. Click **Delete** next to the competency you want to delete. If the delete was successful the item is removed from the list. If the item is being used in a plan or evaluation you will get an error message indicating that you cannot remove the item.
4. To return to the main menu click **Cancel**.

### Custom Competency

Term:

Definition: 

Etiam iaculis magna at justo hendrerit consectetur. Ut elementum risus a est pulvinar at pulvinar purus tincidunt. Praesent mattis sollicitudin lacus in vestibulum. Quisque mattis, nisi sit amet tempus vulputate, diam risus malesuada justo, eget vulputate sem mauris at magna. Pellentesque luctus sodales faucibus. Sed molestie sem vel elit condimentum sed viverra massa hendrerit.

Active:

*Screen shot 8-A – Custom Competency screen (edit mode)*

### ***Maintaining templates***

You can create a template for a particular job title. When you create a new plan for an employee, you can use that template to create the initial plan and then modify the plan to fit the employee.

## Creating a template

To create a template, follow these steps:

1. Log into the system and select the *Supervisor* role.
2. From the main menu under *Template* click **Maintain**. The *Maintain Templates* screen opens (see screen shot 9).
3. Click **Add**. The Template screen opens (see screen shot 10).
4. In the *Template Name* field enter a name for the template.
5. If the template is for a supervisory position check the *Supervisory template* check box.
6. Click **Submit**. The template body section opens (see screen shot 11). This is the same screen you see when you create a new plan.
7. Complete the plan goals, results and competencies for each plan task. To move to the next plan task, click the numbered tabs toward the top of the screen.
8. When you are finished click **Close**. You are returned to the main menu.

Template Name	Plan Type	Edit Title	Edit Body	Remove
Court Clerk II	Nonsupervisory	Edit Title	Edit Body	Remove
General Supervisor	Supervisory	Edit Title	Edit Body	Remove

Cancel

*Screen shot 9 – Maintain templates screen*

Template Name:  \*

Supervisory template:

Submit Cancel

*Screen shot 10 – Template screen*

First	Last	Employee ID	Job title	Phase	Evaluation Type	Evaluation Date
				Plan	Focal-Nonsupervisory	
				Section 1 Grouped Task #		Section 2 Required Work Qualities
				1	2	3
				4	5	6
				7	8	
Assignments/Goals/Objectives			Results expected		Competencies	
<p>Lorem ipsum dolor sit amet, consectetur adipiscing elit. Ut bibendum gravida augue vitae rutrum. Sed at turpis sed nunc porttitor hendrerit. Nulla euismod consectetur elit vel eleifend.</p>			<p>Morbi cursus dapibus dui, eget interdum dolor facilisis at. In scelerisque vulputate arcu, ut blandit leo gravida ut. Donec gravida, urna non imperdiet hendrerit, felis ante tempor dolor, a iaculis orci erat eget risus. Nulla facilisi. Cras nec nunc id orci semper condimentum. Sed nisi mauris, dictum id facilisis ut, rutrum non tortor. Nam accumsan turpis in dui tempus auctor. Nulla cursus facilisis sapien vel sodales. Aliquam lacus dui, pharetra in ultrices ut, laoreet id leo. Duis vel venenatis neque. Aliquam molestie tellus a eros ultrices tincidunt.</p>		<ul style="list-style-type: none"> <li>- Accuracy</li> <li>- Attention to Detail</li> <li>- Customer Service Orientation</li> </ul> <p>Accuracy</p>	
Close						

**Screen shot 11 – Template body**

### **Updating a template**

To update a template, follow these steps:

1. Log into the system and select the *Supervisor* role.
2. From the main menu under *Template* click **Maintain**. The *Maintain Templates* screen opens (see screen shot 9).
3. You can edit the title or the plan tasks in a template.
  - a. If you want to edit the title of the template, click **Edit Title** next to the template you want to change. The *Template* screen opens. Edit the content in the *Title* field and click **Submit**. The *Maintain Templates* screen opens and the change is reflected in the list.
  - b. If you want to edit the plan tasks in the template, click **Edit Body** next to the template you want to change. The template body section opens (see screen shot 11). Complete the plan goals, results and competencies for each plan task. To move to the next plan task click the numbered tabs toward the top of the screen.
4. When you are finished click **Close**. You are returned to the main menu.

### **Working with plans and evaluations**

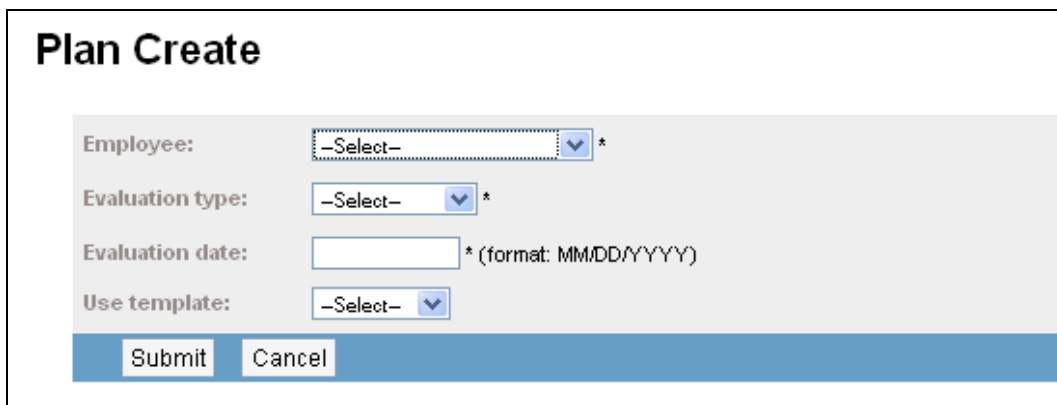
This section describes how to create and update a plan. Note that you can start working on a plan, close it and open it up for editing at any time. When you create a plan its status is *hidden* so your employee cannot see it until you are ready to make it visible. Changing the visibility of a plan is discussed in the section, *Updating a plan or evaluation*.

### **Creating a plan**

To create a plan, follow these steps:

1. Log into the system and select the *Supervisor* role.

2. From the main menu under *Plan/Evaluation* click **New**. The *Create Plan* screen opens (see screen shot 12).
3. From the *Employee* drop-down field select the employee you want to create a plan for.
4. From the *Evaluation type* drop-down select the type of evaluation: Focal, Interim or Probation.
5. Enter the evaluation date in MM/DD/YYYY format.
6. If you want to create this plan using a template, select the template from the *Use template* drop-down field.
7. Click **Submit**. The plan opens (see screen shot 13).
8. In the *Assignments/Goals/Objectives* field enter the information for this first task.
9. In the *Results expected* field enter the results you expect the employee to achieve.
10. Under the *Competencies* column, select a competency that you want the employee to work towards and click the **plus** button. The competency is added just below the column heading. You may repeat this process, adding as many competencies as you wish. Added competencies have a **minus** button next to them in case you want to remove a competency from this task.
11. Click the # 2 *Grouped Task* tab button, the second task opens for edit. Repeat the process of entering data as you did in step 11 above.
12. Complete as many tasks as the HR Department requires for completing the plan.
13. The last tab button, # 8, lists the individual work qualities that all employees should possess. There are no entry fields on this tab.
14. When you have completed the plan, click **Close**. Your work is saved and you are returned to the main menu.



The screenshot shows a web form titled "Plan Create". It contains four rows of input fields, each with a label on the left and a dropdown menu on the right. The first row is "Employee:" with a dropdown showing "-Select-" and an asterisk. The second row is "Evaluation type:" with a dropdown showing "-Select-" and an asterisk. The third row is "Evaluation date:" with a text input field and a note "(format: MM/DD/YYYY)" and an asterisk. The fourth row is "Use template:" with a dropdown showing "-Select-". At the bottom of the form, there is a blue bar containing two buttons: "Submit" and "Cancel".

*Screen shot 12 – Create Plan screen*

First	Last	Employee ID	Job title	Phase	Evaluation Type	Evaluation Date
Pedro	Klecza	92929292		Plan	Focal-Supervisory	02/04/2004
<div style="display: flex; justify-content: space-between;"> <div style="width: 60%;"> <p style="text-align: center;">Section 1 Grouped Task #</p> <div style="display: flex; justify-content: space-around;"> <input type="text" value="1"/> <input type="text" value="2"/> <input type="text" value="3"/> <input type="text" value="4"/> <input type="text" value="5"/> <input type="text" value="6"/> <input type="text" value="7"/> </div> </div> <div style="width: 35%;"> <p style="text-align: center;">Section 2 Required Work Qualities</p> <input type="text" value="8"/> </div> </div>						
Assignments/Goals/Objectives		Results expected			Competencies	
					Accuracy <input type="text" value=""/> +	
<input type="button" value="Save &amp; Close"/> <input type="button" value="Save"/> <input type="button" value="Overall Comments"/>						

Screen shot 13 –Plan screen

### Updating a plan or evaluation

To update a plan, follow these steps:

1. Log into the system and select the *Supervisor* role.
2. From the main menu under *Plan/Evaluation* click **Update**. The *Plan/Evaluation Update* screen opens.
3. From the *Employee* drop-down field, select the employee whose plan or evaluation you want to work with. The *Plan/Evaluation Update* screen (see screen shot 14) displays all plans and evaluations for the employee, whether the plan has been reviewed, and the *phase* (plan, evaluation, or closed).

From this screen you can carry out several operations depending on the phase or status of the plan or evaluation.

- You can change a plan to an evaluation by clicking on the label under the *Phase* column (or change the evaluation back to a plan).
  - You can change the visibility of the plan or evaluation so the employee cannot view or print the plan/evaluation.
  - You can edit the plan header (the evaluation type, evaluation date, and in some cases the employee’s job title or the supervisor listed on the plan or evaluation) by clicking **Δ Header**.
  - You can edit the plan or evaluation by clicking **Update**.
  - You can finalize an evaluation.
  - You can print an evaluation.
4. Clicking **Update** opens the plan or evaluation for editing. In the evaluation phase, the “plan portion” is not editable, but you may enter data into the notes and score fields (see screen shot 15).

5. Clicking the **Comments** button allows the supervisor to view the employee's comments on the plan and/or evaluation. The supervisor can enter comments only in the evaluation phase.
6. When you are done updating the plan or evaluation, click **Close**. Your work is saved and you are returned to the main menu.

### **Changing employee job title on a plan or evaluation**

An employee's job title is set on the plan at the time of creation. However, if the employee's job title changes between the time the plan was created and the evaluation is finalized, you may update the job title on the plan or evaluation. You should only do so if the employee held the new job title sometime during the plan/evaluation cycle for the plan or evaluation you are changing.

If the employee's job title has changed from what is listed on the plan, the *Update Plan Header* screen will show the title on the plan, the current title of the employee and a checkbox to update the plan or evaluation to the employee's current job title (see screen shot 13-a). To update the job title, check the checkbox and click **Submit**.

**Warning:** Be very careful using this feature as there is no "undo" function once you have made the change.

### **Changing a supervisor on a plan or evaluation**

You may gain new employee(s) through transfer into your department or if you have just become a supervisor to a new group. In either case, the plans and evaluations for your new employee(s) have their prior supervisor listed on their plans. You can update their current plans and evaluations to show you as the supervisor. You should only do so to plans and evaluations in the current cycle.

If the employee's current supervisor is different from what is listed on the plan, the *Update Plan Header* screen will show the supervisor on the plan, the current supervisor of the employee and a checkbox to update the plan or evaluation to the employee's current supervisor (see screen shot 13-a). To update the supervisor, check the checkbox and click **Submit**.

**Warning:** Be very careful using this feature as there is no "undo" function once you have made the change.

#### Update Plan Header

Employee:	Sebene Lynn Boston		
Evaluation type:	<input type="text" value="FOCAL"/>	*	
Evaluation date:	<input type="text" value="09/25/2018"/>	* (format: MM/DD/YYYY)	
Job title on plan:	AOC Software Development Manager Current title for employee: AOC Systems Manager Update plan with current job title? <input type="checkbox"/>		
Supervisor on plan:	Trixi Bubemyre Current supervisor: Steve Prisoc Update plan with current supervisor? <input type="checkbox"/>		
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>			

*Screen shot 13-A – Update plan header*

### **Copying from an evaluation**

You can copy the previous year's evaluation to make a new plan for the current year.

To create a copy, follow these steps:

1. Log into the system and select the *Supervisor* role.
2. From the main menu under *Plan/Evaluation* click **Update**. The *Plan/Evaluation Update* screen opens.
3. From the *Employee* drop-down field, select the employee whose plan or evaluation you want to work with. The *Plan/Evaluation Update* screen (see screen shot 14) displays all plans and evaluations for the employee.
4. Next to the evaluation you want to copy, click **Copy**. A dialog box asks you to confirm that you want to copy the plan.
5. Click **OK**. The plan is copied and the evaluation date is set to the current date.

### **Deleting a plan**

You can delete a plan or evaluation as long as it is not finalized.

**Warning:** Once you delete a plan or evaluation, it is gone forever.

To delete a plan or evaluation, follow these steps:

1. Log into the system and select the *Supervisor* role.
2. From the main menu under *Plan/Evaluation* click **Update**. The *Plan/Evaluation Update* screen opens.
3. From the *Employee* drop-down field, select the employee whose plan or evaluation you want to work with. The *Plan/Evaluation Update* screen (see screen shot 14) displays all plans and evaluations for the employee.
4. Next to the plan or evaluation you want to delete, click **Delete**. A dialog box asks you to confirm that you want to delete the item.
5. Click **OK**. The item is deleted.

### **Finalizing an evaluation**

When you, the employee, and the reviewer have signed the printed evaluation, you should finalize the evaluation.

**Warning:** Once you finalize an evaluation, no further changes can be made.

To finalize an evaluation, follow these steps:

1. Log into the system and select the *Supervisor* role.
2. From the main menu under *Plan/Evaluation* click **Update**. The *Plan/Evaluation Update* screen opens.

3. From the *Employee* drop-down field, select the employee whose plan or evaluation you want to work with. The *Plan/Evaluation Update* screen (see screen shot 14).
4. Click **Finalize** on the evaluation you want to finalize. The application warns you that if you finalize the evaluation you can not make any changes to it in the future.
5. If you are sure you want to finalize the evaluation, click **Finalize Evaluation**, otherwise click **Cancel**.

**Plan/Evaluation Update**

Select the employee whose plan/evaluation you want to work with.

Employee:

Evaluation Date	Evaluation Type	Phase	Hide	Reviewed	Update	Copy Plan	Delete	Header	Finalize	Print
Aug 29, 2011	Focal	Δ Evaluation	Δ Visible	No	Update	Copy	Delete	Header	Finalize	Print
Sep 7, 2011	Focal	Δ Plan	Δ Hidden	No	Update		Delete	Header		Print

*Screen shot 14 - Plan/Evaluation Update screen*

First	Last	Employee ID	Job title	Phase	Evaluation Type	Evaluation Date
Pedro	Kieczka	92929292	Software Applications Developer Senior	Evaluation	Focal-Supervisory	02/04/2004

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Section 1 Grouped Task #							Section 2 Required Work Qualities
1	2	3	4	5	6	7	8
<b>Assignments Goals Objectives</b> Lorem ipsum dolor sit amet, consectetur adipiscing elit. Quisque dignissima, dolor a tempor vehicula, lorem tellus				<b>Results expected</b> Donec sit amet felis vel dui eleifend porttitor sit amet vitae magna. Nulla commodo pharetra justo in iaculis. Praesent tempor, eros et facilisis placerat, velit ipsum rutrum metus, quis ornare ipsum felis a mauris. Suspendisse potenti.			<b>Competencies</b> Accuracy Attention to Detail Effective Writing Skills
<b>Eval Notes</b> Cras interdum lacus ut leo ullamcorper ut sodales diam hendrerit. Praesent vel sapien quis iaculis congue venenatis. Vivamus tortor leo, accumsan vel malesuada sit amet, congue ac eros. Duis non mauris a ante tempus blandit. Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia Curae. Morbi volutpat porttitor volutpat. Aenean a purus vitae lectus placerat tincidunt a vel tortor.				Score: <input type="text" value="Surpasses"/>			

*Screen shot 15 - Evaluation screen*

**Reviewer’s tasks**

This section describes the tasks that reviewers perform in the system. Your tasks include:

- Updating plans and evaluations
- Marking plans and evaluations as reviewed
- Commenting on the overall evaluation

**Updating and reviewing plans and evaluations**

To review a plan or evaluation, follow these steps:

1. Log into the system and select the *Reviewer* role.
  - a. If you have more than one supervisor for whom you conduct reviews the *Select Supervisor* screen opens, otherwise see step 2 below.
  - b. From the drop-down, select the supervisor whose employees you want to review. Once you select the supervisor, the main menu opens.
2. From the main menu under *Plan/Evaluation* click **Update**. The *Review Plan/Evaluation* screen opens.
3. From the *Employee* drop-down field select the employee whose plan or evaluation you want to work with. The *Plan/Evaluation Update* screen (see screen shot 15) displays all plans and evaluations for the employee, whether the plan has been reviewed, the *phase* (plan, evaluation, or closed), and if the plan has been reviewed.

From this screen you can carry out several operations depending on the phase or status of the plan or evaluation.

- You can change a plan to an evaluation by clicking on the label under the *Phase* column (or change the evaluation back to a plan).
  - You can change the visibility of the plan or evaluation so the employee cannot view or print the plan/evaluation.
  - You can edit the plan or evaluation by clicking **Update**.
  - You can mark a plan as reviewed.
  - You can print an evaluation.
4. Clicking **Update** opens the plan or evaluation for editing. In the evaluation phase, the “plan portion” is not editable, but you may enter data into the notes and score fields (see screen shot 17).
  5. Clicking the **Comments** button allows the reviewer to view the employee’s comments on the plan and/or evaluation. The reviewer can enter comments only in the evaluation phase.
  6. If the plan or evaluation has not yet been marked as reviewed, the **Mark as reviewed** button appears next to the close button. Marking a plan or evaluation as reviewed closes the screen and returns you to the main menu.
  7. When you are done updating the plan or evaluation, click **Close**. Your work is saved and you are returned to the main menu.

## Review Plan/Evaluation

Select the employee whose plan/evaluation you want to work with.

Employee:

Evaluation Date	Evaluation Type	Phase	Hide	Reviewed	Update	Print
Mar 4, 2010	Focal	△ Plan	△ Visible	△ Yes	Update	Print
May 7, 2010	Focal	△ Evaluation	△ Hidden	△ No	Update	Print
May 20, 2010	Focal	Closed	△ Visible			Print
May 21, 2010	Interim	△ Plan	△ Hidden	△ No	Update	Print

Screen shot 16 –Plan/Evaluation Review screen

First	Last	Employee ID	Job title	Phase	Evaluation Type	Evaluation Date
Peter	Klecza	8675309	Software Applications Developer Senior	Evaluation	Focal-Nonsupervisory	03/04/2010

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Section 1 Grouped Task #				Section 2 Required Work Qualities			
<input type="text" value="1"/>	<input type="text" value="2"/>	<input type="text" value="3"/>	<input type="text" value="4"/>	<input type="text" value="5"/>	<input type="text" value="6"/>	<input type="text" value="7"/>	<input type="text" value="8"/>

Assignments Goals Objectives	Results expected	Competencies
<p> Lorem ipsum dolor sit amet, consectetur adipiscing elit. Quisque suscipit erat in nunc egestas eget convallis purus auctor. Suspendisse a nulla libero. Nam placerat dignissima est, at mollis dui sodales sit amet. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Sed ut risus id elit interdum blandit a at ligula. Aenean pulvinar sem nec urna laoreet ultricies. Nunc ultricies nulla eget lorem ultricies dapibus. Vivamus fringilla, odio non ultricies congue, mauris tellus dictum ante, sed fermentum nulla urna tempus neque.</p>	<p> Sed ut risus id elit interdum blandit a at ligula. Aenean pulvinar sem nec urna laoreet ultricies. Nunc ultricies nulla eget lorem ultricies dapibus. Vivamus fringilla, odio non ultricies congue, mauris tellus dictum ante, sed fermentum nulla urna tempus neque.</p>	<ul style="list-style-type: none"> <li>Accuracy</li> <li>Attention to Detail</li> <li>Confidentiality - Communications &amp; Documents</li> <li>Customer Service Orientation</li> </ul>

Eval Notes:

Score:

Screen shot 17 –Evaluation screen

## Employee's tasks

This section describes the tasks that employees perform in the system. Employee tasks include:

- Viewing competency and individual qualities definitions
- Working with the employee communication form
- Viewing your plans and evaluations
- Commenting on your plans and evaluations

### ***Viewing definitions***

The main menu displays links that allow you to view standard competency definitions, competency definitions you supervisor has created, and individual work quality definitions.

To view definitions, follow these steps:

1. Log into the system and if the system asks you to select a role, select the *Employee* role.
2. From the main menu, under *Competencies* click **View Competencies** (to view the standard competencies) or **View My Supervisor's Custom Competencies**. The competencies and their definitions are displayed.
3. To return to the main menu, click **Close** at the top-right of the list.

### ***Communication form***

The communications form is for communicating with your supervisor prior to a review. You can create, update, print and delete your communication forms. Your supervisor cannot see your communication form on the system. When you have completed your communication form and are ready to show it to your supervisor you can print it out or save it as a PDF and email it to your supervisor if you wish.

### **Creating a communications form**

To create a new communication form, follow these steps:

1. Log into the system and if the system asks you to select a role, select the *Employee* role.
2. From the main menu, under *Communication* click **Maintain**. The *Maintain Communication Forms* screen opens.
3. Click **Add**. The *Communication Form* screen opens.
4. Enter the evaluation date and the information you wish to enter in each section.

5. Click **Submit**. The *Maintain Communication Forms* screen opens and displays the list of forms you have created.
6. To return to the main menu, click **Cancel**.

### **Updating a communications form**

To update a communication form, follow these steps:

1. Log into the system and if the system asks you to select a role, select the *Employee* role.
2. From the main menu, under *Communication* click **Maintain**. The *Maintain Communication Forms* screen opens.
3. Click **Edit** next to the form in the list you want to edit. The *Communication Form* screen opens.
4. Edit the evaluation date and/or the information you wish to enter in each section.
5. Click **Submit**. The *Maintain Communication Forms* screen opens and displays the list of forms you have created.
6. To return to the main menu, click **Cancel**.

### **Printing a communications form**

To print a communication form, follow these steps:

1. Log into the system and if the system asks you to select a role, select the *Employee* role.
2. From the main menu, under *Communication* click **Maintain**. The *Maintain Communication Forms* screen opens.
3. Click **Print** next to the form in the list you want to print. The form is displayed as PDF in your browser. You can print the PDF or save the PDF to your desktop.
4. To return to the main menu, click your browser's back button, then click **Cancel**.

### **Deleting a communications form**

To delete a communication form, follow these steps:

1. Log into the system and if the system asks you to select a role, select the *Employee* role.
2. From the main menu, under *Communication* click **Maintain**. The *Maintain Communication Forms* screen opens.
3. Click **Delete** next to the form in the list you want to delete. The *Maintain Communication Forms* removes the form from the list of forms you have created.
4. To return to the main menu, click **Cancel**.

### ***Plans and evaluations***

You can view or print your plans and evaluations at any time unless they are hidden. Your supervisor may hide the contents of the plan or evaluation until they are ready for you to see it. If the plan or evaluation is hidden, you will still be able to see it listed on the Plan/Evaluation View screen (see screen shot 18), but you will not be able to view or print it.

You can enter a comment on a plan or evaluation (while the evaluation is open). Once your supervisor has finalized your evaluation, you can not view it online or change comments, however you can still print it.

### **Viewing and commenting**

To view and/or comment on your plan or evaluation, follow these steps:

1. Log into the system and if the system asks you to select a role, select the *Employee* role.
2. From the main menu, under *Plan/Evaluation* click **View**. The *Plan/Evaluation View* screen opens (see screen shot 18).
3. If you want to view and/or comment on an open plan or evaluation, click **View** next to the item you want to work with. The plan or evaluation opens.
4. To add a comment, click **Comments**. The comments section opens.
5. Enter comments in the available comments field. During the plan phase, the plan comment is available for you to enter comments, but the evaluation comments box is not active. In the evaluation phase the situation is reversed; the plan comment field is inactive, but you can enter comments in the evaluation comments field. Click **Close** to save your comments and return to the main menu.

### **Printing plans and evaluations**

To print your plan or evaluation, follow these steps:

1. Log into the system and if the system asks you to select a role, select the *Employee* role.
2. From the main menu, under *Plan/Evaluation* click **View**. The *Plan/Evaluation View* screen opens (see screen shot 18).
3. Click **Print** next to the item you want to print. The plan or evaluation opens in a Microsoft Word document.

## Plan/Evaluation View

Evaluation Date	Evaluation Type	Phase	View	Print
Mar 4, 2009	Interim	Hidden Plan		
Jun 1, 2010	Focal	Finalized		Print
Jul 4, 2010	Focal	Evaluation	View	Print

Cancel

*Screen shot 18 – Plan/Evaluation View screen*

## Trouble shooting

### **Issue: The account registration email link to activate my account will not work.**

Your supervisor may have tried to resend the registration email from the application. Each time the application sends an email it appends a new code to the registration link. Make sure you are using the latest email to register.

### **Issue: After working with the Forgot Password function my account is locked.**

Contact the Human Resources department and ask for an account reset.

### **Issue: When I click 'Print' on a Plan/Evaluation or Communication form, nothing happens.**

Rendering the document takes time. Please be patient and allow at least 60 seconds for the PDF to open.

### **Issue: The total score on a printed evaluation says "INVALID".**

An evaluation must have a minimum of four scored tasks in order to calculate a valid score.

### **Issue: When creating a plan you get the message "Person does not have active job title".**

Both your job title and your employee's job title must be current before you can create a plan. If your employee's job title is not current, you can edit the employee's account. For more information on editing your employee's account, see *Account Maintenance*. If your job title is not current, contact your supervisor or Human Resources.