GUIDE TO PERFORMANCE MANAGEMENT

Powered through: **MyPURPOSE**

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Competencies

Competencies are observable and identifiable skills, knowledge, abilities demonstrated as behaviors that directly affect performance of an employee. Competencies help evaluators a "how" an employee achieves their performance goals and performs their job duties.

When a Performance Plan is launched, all employees are automatically assigned the same six (6) core competencies. If an employee is a line-supervisor in the Commonwealth's Personnel system, Kentucky Human Resource Information System (KHRIS) then three (3) additional leadership competencies are assigned. Competencies are defined for the evaluator however, when creating a Performance Plan the evaluator will have the option to list agency specific information within the comment box.

Percentages are not assigned to competencies; MyPURPOSE automatically weighs competencies equaling 100%. When the final rating is calculated, competencies account for 50% of the overall rating. During interim reviews, employees, and evaluators can leave comments pertaining to the competencies. These comments should be specific and descriptive to support the rating assigned during the final evaluation.

See the below chart for a description of both core and leadership competencies.

Core Competencies

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 evaluators assess "what" the employee accomplished as part of the annual performance review.

When creating the Performance Plan the evaluator should review the employees Position Description (PD) to ensure the goals match the tasks outline in the PD. Each employee should be assigned at least 3 goals with associated tasks. The goals/tasks should be descriptive and clearly define what expectations will be used to evaluate the employee.

Goals are individually weighted by the evaluator and must collectively equal 100%. The goal section for the Performance Plan accounts for 50% of the overall rating on the final evaluation.

Rating Scale

The overall rating is calculated as a 50-50 split. Competencies are equally weighted totaling 100%; this is completed automatically in the system. Goals will use their assigned weights also equaling 100%. Each section is worth 50% therefore, the final overall rating is an average of the two sections. MyPURPOSE will automatically calculate the final rating once the year-end interim is completed, and the evaluator assigns a rating to each competency and goal during the final evaluation.

The Final Performance Evaluation rating 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 in the system. Employees now have two steps in each performance phase, a Self-Review, and an Acknowledgement step. The Self Review is optional and intended to allow employees the opportunity to provide feedback on assigned competencies and goals. The next line supervisor also plays a role by reviewing each performance task before the evaluator and employee discussion.

Each step has an associated due date, to keep the task on track so that the performance phase is completed by the compliance date outlined in regulation. Some steps within the process are required while others are optional. If the step is optional, the system will workflow the task on to the next step without any action from the user once the due date arrives. However, required steps will remain visible until action is taken and will become past due once the due date passes.

The evaluator, next line supervisor and the employee will receive e-mail notifications from MyPURPOSE throughout the process. An e-mail when a task is assigned to your action item within MyPURPOSE and when a task becomes past due.

Annual Performance Plan	Mid-Year Interim Review	Year-End Interim Review/Final Evaluation
Evaluator Review	Self Review	Self Review
Self Review	Evaluator Review	Evaluator Review
Evaluator Goal Review Confirmation	Next Line Supervisor Review	Evaluator Discussion and Acknowledgment Interim
Next Line Supervisor Review	Evaluator Discussion and Acknowledgment	Employee Acknowledgment Interim
Evaluator Discussion and Acknowledgment	Employee Acknowledgment	Evaluator Rating
Employee Acknowledgment		Next Line Supervisor Review
		Evaluator Discussion and Acknowledgment Final
		Employee Acknowledgment Final

Evaluator

Evaluator Annual Performance Planning

Evaluator Review
An Annual Performance Plan will launch to the evaluator early January for each eligible employee who report to them in KHRIS. The first step during the Annual Performance Planning phase is the Evaluator Review. Here, the evaluator will outline any agency specific guidelines within the competency section and assign at least 3goals with at least one associated task. The Evaluator Review step is a required step that will not advance to the employee until completed. E-mail notification will be sent to the evaluator once the task is launched and once the task becomes past due.

1. From the MyPURPOSE home screen, select the MyPERFORMANCE Button


2. Select MyACTIONS.
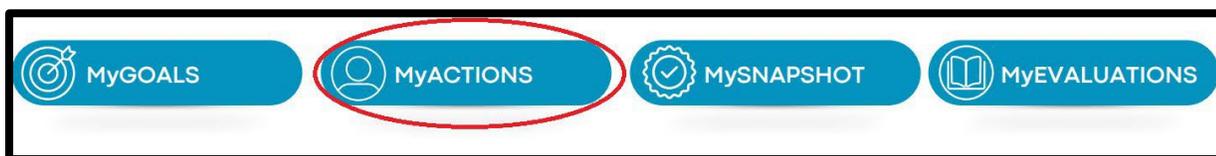
3. You will have a separate task for each employee who is eligible for a performance plan and reports to you in the Commonwealth's Personnel System, KHRIS. Select **Launch** next to one of your Annual Performance Planning tasks.

   a. If you are missing a task for a performance eligible employee, please contact your agency Performance Management Administrator.

   b. If you have a task for an employee who does not report to you, contact your agency Performance Management Administrator.

4. On the right-hand side of your screen, you will notice a dropdown labeled **Options**. Use this to add up to three (3) attachments per Performance Evaluation.

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

6. **Employee on Leave**- If the employee is on leave and unable to complete the performance review by the compliance date, please select **Yes** and **Save and Exit**. If the employee is not on leave, select **Save and Continue.**
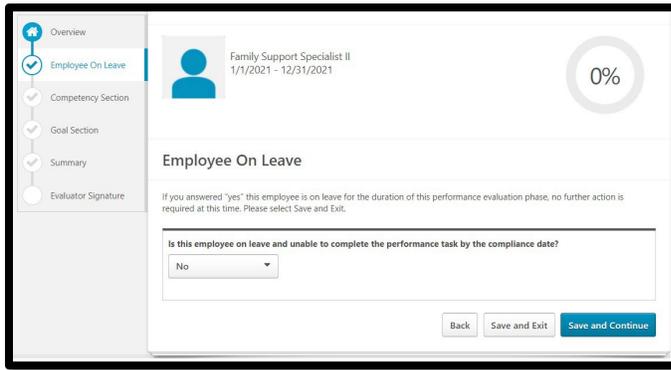
If you have an employee on leave, please see the employee on leave reference document located under Evaluator Resources on our Performance Management Website.

7. **Competency Section**- Review the instructions for the Annual Performance Planning and scroll down to review the core competencies. If an employee has the wrong competencies listed, please contact your agency Performance Management Administrator for guidance. You will notice for each competency you have the option to include comments for further explanation or agency specific guidelines.

   a. *For example*, under Professional Development you may add a comment that says, "Employee is expected to complete 6 hours of training per year."

   b. Competencies are not assigned individual percentages. The system will automatically weigh each competency equally, totaling 100%. Competencies account for 50% of the overall Performance Evaluation Rating.

   c. For more information, review the Competencies section of this manual.

8. After you have reviewed all competencies and added any necessary comments, select **Save and Continue**.

9. **Goal Planning Section**- Review the instructions for the evaluator. The evaluator is required to create at least 3 goals to each eligible employee. To do so, select **Add Goals** located on the right-hand side of your screen.

   a. Use one of the two methods listed below to add the employee's goals.
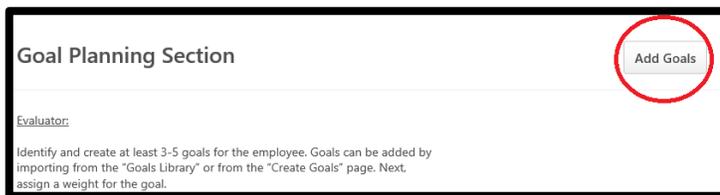

      i. You can *manually* enter the goals by entering a goal into the title field. The description field is available to further define the goal; this is not required. OR see below on how to utilize the goals library.
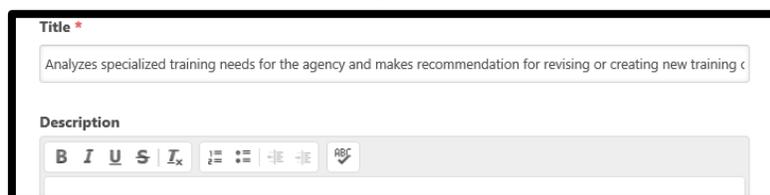
ii. For your convenience, we have created a goals library with a list of possible goals for all job titles. These goals are populated from the Job Class Specification and should be modified for the employee. To utilize this feature, select **Library** located on the right-hand side of your screen.

1. Enter the employee's job title and select **Search**.
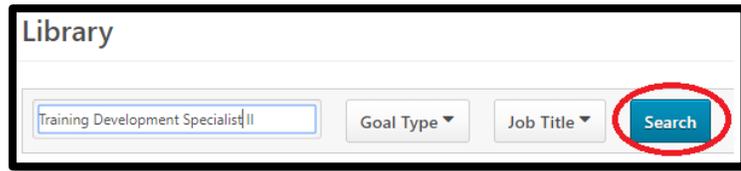
2. Select the radio button next to a goal you wish to add, select **Import**.

   a. Only one goal can be imported at one time.

   b. Ensure you are selecting goals with a title that corresponds with the employee's job title.

   c. Other duties as assigned is not a goal however, this can be used as a task within a goal.
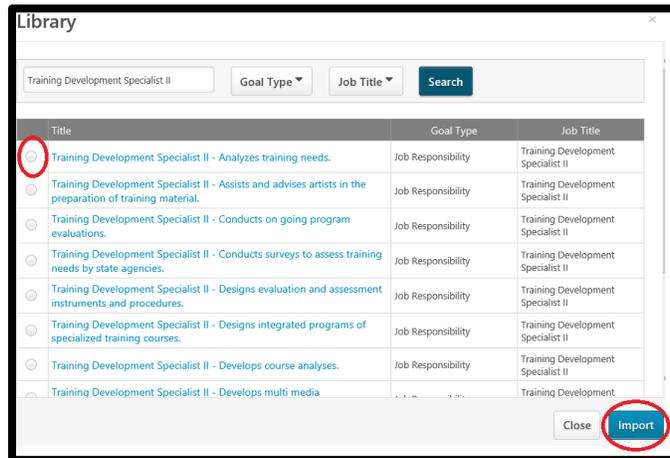
3. Once imported, please remove the position title from the goal title and add specific position.

   a. information to the imported goal.

   b. The description field is available to further define the goal; this is not required.

b. Verify each goal has a start and end date that matches the review period. For example, 01/01/2022 -12/31/2022

c. **Weight each goal**. The system will accept any percentage you enter; all goals should collectively 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 dropdown 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 could use the dropdown 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.

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

g. Verify the task start and end dates match the review period and select **Done**. For example, 01/01/2022 – 12/31/2022

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

h. From the Create Goals page, review the goals and tasks that you have created 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 dropdown to view options for each goal.

Remember that the 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.

10. Once the Goal Planning section is completed, select **Submit**. You will receive a second submit notice, select **Submit**. The task will automatically follow step progression and advance the plan to the employee for the optional Self Review.

As the evaluator, you can track where an Annual Performance Plan is in workflow by utilizing the Step Status Report. For detailed report instructions see the [Step Status Report](#) instructions within this manual or on the Performance Management website.

Evaluator Goal Review Confirmation

The Evaluator Review Confirmation step is intended for you to review any feedback left by the employee during the Self Review and make any necessary adjustments to competencies and/or goals. Remember, that the Self Review Step is an optional step and automatically advances on the due date. If the employee missed the opportunity to complete their Self Review, you can reopen the task back to the employee.

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 once the task becomes past due.

1. Once the 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 the task, do not submit. When a task is reopened, the task will show in your worklist and in the employee's worklist at the same time. If you select submit, you will not have the option to review any comments left by the employee during the Self Review. 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 competencies. Based on the feedback left by the employee, make any necessary adjustments to your initial comments, select **next.**

4. **Goal Planning Section**- Review the instructions for the evaluator.

   a. Based on employee feedback during the Self Review, you can adjust goals/tasks by selecting the dropdown on the right-hand side of each goal and choose to edit or delete.

After any adjustments, ensure the total goal weight equals 100%.

> Training Development Specialist II - Analyzes training needs.
>
> New – Please Review
>
> Analyzes training needs.
>
> Edit
> Delete
> View History
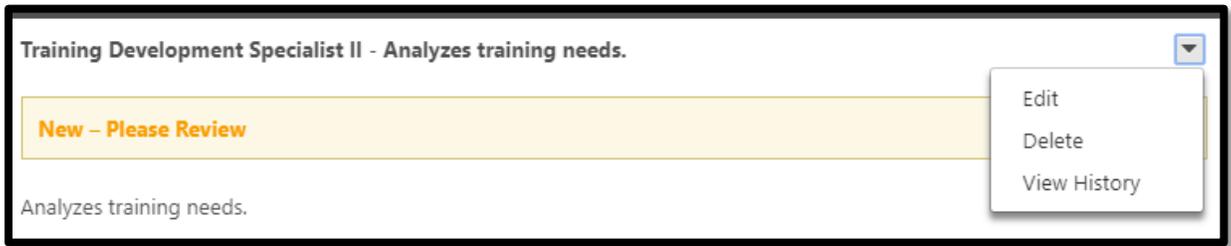
b. The comment box provided is optional and intended for you to respond to any feedback left by the employee.

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.

The total goal 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.
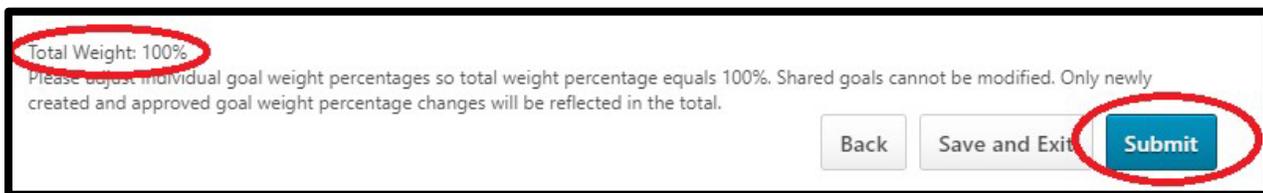
> Total Weight: 100%
> Please adjust individual goal weight percentages so total weight percentage equals 100%. Shared goals cannot be modified. Only newly created and approved goal weight percentage changes will be reflected in the total.
>
> Back   Save and Exit   Submit

Evaluator Discussion and Acknowledgment

The Evaluator Discussion and Acknowledgment step is intended for the evaluator to meet and discuss the plan with the employee in a required meeting. This step is required and will not advance until completed. The evaluator should not submit this step until after the meeting with the employee. If the step is submitted, the evaluator must contact their agency Performance Administrator to have the step reopened for edits. E-mail notification will be sent to the evaluator once 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.**

> Complete Annual Performance Planning
> Due: 6/25/2019   Status: Not Started
>
> 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 Self Review or to the Next Line Supervisor Review step. If you utilize the reopen feature please close the task, do not submit. If you select submit, you will not have the option to review any comments left by the employee during the Self Review. When a task is reopened the task will show in your worklist and the employee/next line supervisor worklist at the same time. It is imperative that you communicate outside the system when the task is reopened.

> Reopen Step   Get Started

3. **Competency Section**- 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 and make any final adjustment, select **Next**.

4. **Goal Planning Section-** Review the instructions 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 and make any final adjustments, 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 plan to the employee for acknowledgment. If edits are required after this step is submitted, you must contact your agency Performance Administrator to have the step reopened.

After the employee has completed the acknowledgement step, you can view their completed Performance Plan from the Performance home page, select the MyEVALUATIONS tile and 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

Evaluator Review

The first step in the Mid-Year Interim Review is the optional employee Self Review. This will launch early July and the employee has five (5) days to complete before it automatically workflows to the evaluator. If the employee missed the opportunity to complete their Self Review, you can reopen the task back to the employee.

The Evaluator Review step will allow the evaluator the opportunity to comment on all competencies and goals based on the employee's performance January 1st thru June 30th. This step is a required and will not advance until completed. E-mail notifications will be sent to the evaluator once the becomes past due.

1. From the MyPURPOSE Home screen, select the MyPerformance Button.

2. Select MyACTIONS.
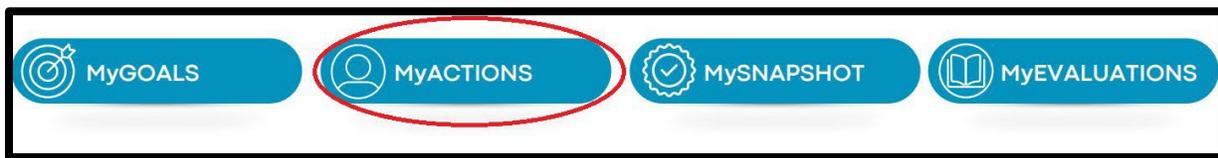
3. You will have a separate task for each employee who is eligible for a Mid-Year Interim Review and reports to you in the Commonwealth's Personnel System, KHRIS. Select **Launch** next to one of your Mid-Year tasks.

   a. If you do not have a task for a performance eligible employee, contact your agency Performance Management Administrator.

   b. If you have a task for an employee that does not report to you contact your agency Performance Management Administrator.

   c. You should ensure the employees Annual Performance Plan is complete prior to starting the Mid-Year Interim Review.


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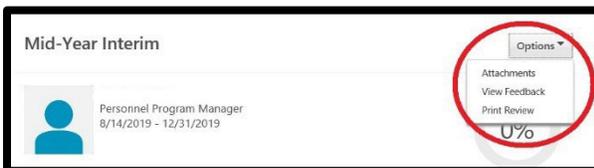
5. Each task will start with an overview, please read the Mid-Year Interim Review overview carefully and select **Get Started**.
   You will notice beside Get Started you have a **Reopen Step** option. Use this if you need to return the task to the employee for Self Review. If you utilize the reopen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

6. **Employee on Leave**- If the employee and unable to complete the task by the compliance date, please select **Yes** and **Save and Exit**. If the employee is not on leave, select **Save and Continue.**

If you have an employee on leave, please see the employee on leave reference document located under Evaluator Resources on our Performance Management Website.

7. **Competency Section**- 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. Comments left during interim reviews should reflect the employee's performance from January 1st thru June 30th and support the employee's final rating during the Final Evaluation. Be sure to provide detail and use specific examples.

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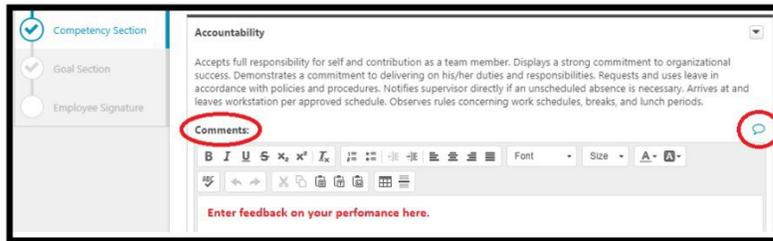
8. After you have reviewed and commented on each competency, select **Save and Continue**.

9. **Goal Section-** Review the instructions for the evaluator and scroll down to view any comments left by the employee during their Self Review.

   a. Comments are required from you, the evaluator, on all goals listed. Comments left during the Mid-Year interim review should reflect the employee's performance from January 1st thru June 30th. Comments left during interim reviews should support the employee's final rating during the Final Evaluation. Be sure to provide detail and use specific examples.

   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.

As the evaluator you can track where a Mid-Year Interim Review is in workflow by utilizing the Step Status Report. For detailed report instructions see the Step Status Report Instructions within this manual or on the Performance Management website.

Evaluator Discussion and Acknowledgment

The Evaluator Discussion and Acknowledgement step is intended for the evaluator to meet and discuss the employee's performance from January 1st to June 30th in a required meeting. This is a is a required step and will not advance until completed. The evaluator should not submit this step until after the meeting with the employee. If the step is submitted the evaluator must contact their agency Performance Administrator to have the step reopened for edits. E-mail notification will be sent to the evaluator once 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.**

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. If you select submit you will not have the option to review any comments left by the employee during the Self Review. When a task is reopened the task will show in your worklist and in the next lines or employee's worklist at the same time. It is imperative that you communicate outside the system when the task is reopened.

3. **Competency Section**- Review the instructions for the Mid-Year Interim and scroll down to review the core competencies. Here you will be able to review all comments left by the employee and yourself and make any final adjustment, select **Next**.

4. **Goal Section-** Review the instructions 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 and make any final adjustment, 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 advances the Mid-Year Interim Review to the employee for acknowledgment. If edits are required after this step is submitted, you must contact your agency Performance Administrator to have the step reopened.
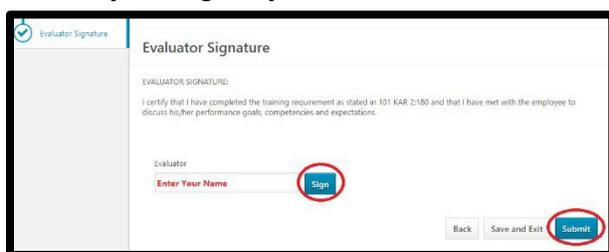
After the employee has completed the acknowledgement step you can view their completed Mid-Year Interim Review from the performance home page, select the MyEVALUATIONS tile, then select the box next to *Show completed and expired task.* This will list steps and performance reviews you have completed for your employees. You can view the performance review here in a read only view.

Evaluator Year-End Interim Review/Final Performance Evaluation

The Year-End Interim Review/Final Performance Evaluation are two separate processes launched together in one task. During this phase, the evaluator and employee are required to complete two acknowledgement steps. It is important to remember that the evaluator will not be able to assign a final rating until the employee completes their first acknowledgement step. If you receive an employee **after** November 1st, the Final Evaluation must be completed by the prior evaluator. You will use the co planner feature to assign the previous supervisor to the task. Per Regulation, you must supervise an employee sixty (60) calendar days to apply the rating and complete the Final Evaluation. If you need assistance on assigning a co planner, please reach out to your agency performance management administrator.

Evaluator Review for Year-End Interim Review

The first step in the Year-End Interim Review is the optional employee Self Review. The employee has five (5) days to complete before it automatically workflows to the evaluator. If the employee missed the opportunity to complete their Self Review, you can reopen the task back to the employee.

The Evaluator Review Step allows the evaluator the opportunity to comment on all competencies and goals based on the employee's performance from July 1st to December 31st. This is a required step and will not advance until completed. E-mail notifications will be sent to the evaluator once the task becomes past due.

1. From the MyPURPOSE Home screen, select the MyPERFORMANCE Button.


2. Select MyACTIONS.

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

a. If you do not have a task for a performance eligible employee, contact your agency Performance Management Administrator.

b. If you have a task for an employee that does not report to you, contact your agency Performance Management Administrator.

c. c. You should ensure the employees Annual Performance Plan is complete prior to starting the Mid-Year Interim Review.

4. 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. The system allows three (3) attachments per Employee Evaluation.


5. 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 the task, do not submit. If you select submit, you will not have the option to review any comments left by the employee during the Self Review. When a task is reopened, the task will show in your worklist and in the employee's worklist at the same time. It is imperative that you communicate outside the system when the task is reopened.

6. **Competency Section**- 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. Comments left during the Year-End Interim Review should reflect the employee's performance from July 1st thru December 31st. Comments left during interim reviews should support the employee's final rating during the Final Evaluation. Be sure to provide detail and use specific examples.

b. To the right of the comments box, we have included a suggested comments tool 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. **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. Comments left during the Year-End interim review should reflect the employee's performance from July 1st thru December 31st. Comments left during interim reviews should support the employee's final rating during the Final Evaluation. Be sure to provide detail and use specific examples. Once again, the suggested comments tool is available for your convenience.

9. After you have commented on each goal, select **Save and Continue**.

10. **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.
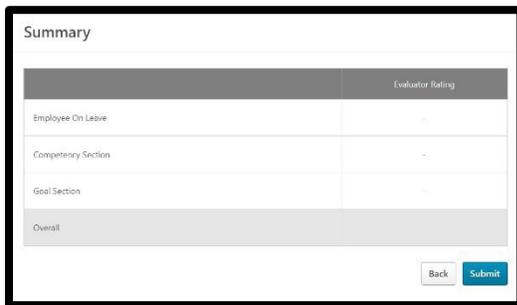
Evaluator Discussion and Acknowledgment for Year-End Interim Review:

The Evaluator Discussion and Acknowledgement step is intended for the evaluator to meet and discuss the employee's performance from July 1st to December 31st in a required meeting. This is a required step and will not advance until completed. The evaluator should not submit this step until after the required meeting with the employee. If the step is submitted the evaluator must contact their agency Performance Administrator to have the step reopened for edits. E-mail notification will be sent to the evaluator once the task is launched and when then the task becomes past due.

1. Once the Year-End Interim has been reviewed and the employee and evaluator have commented on both competencies and goals, the task will return to your Action items in MyPURPOSE for acknowledgement, select **Launch**.

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 the task, do not submit. If you select submit you will not have the option to review any comments left by the employee during the Self Review. When a task is reopened the task will show in your worklist and in the employee's worklist at the same time. It is imperative that you communicate outside the system 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 and make any final adjustment, 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 and make any final adjustment, select **Next**.

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

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 Review to the employee for acknowledgment.
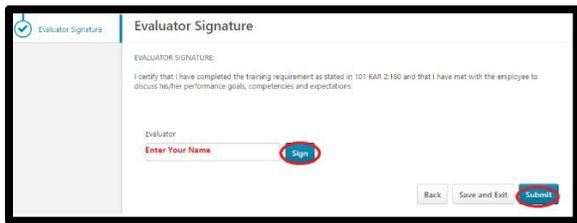
This is the final step for the evaluator for the Year-End Interim Review

## Evaluator Rating for Final Performance Evaluation:

Once the employee has completed the Employee Acknowledgement step for the Year-End Interim Review the task will automatically be assigned back to you to apply the final rating. It is imperative that you understand the difference between each rating. For additional information, regarding ratings please visit the resources listed on our Performance Management website. This is a required step and will not advance until completed. E-mail notification will be sent to the evaluator once 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 Review/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. If you utilize the reopen feature, please close the task, and do not submit, if you select submit the task will not workflow back to you to review any edits or additional comments left by the employee. When a task is reopened the task will show in your worklist and in the employee's worklist at the same time. It is imperative that you communicate outside the system 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 a dropdown labeled **Select.** Use the dropdown to select a rating for each competency.
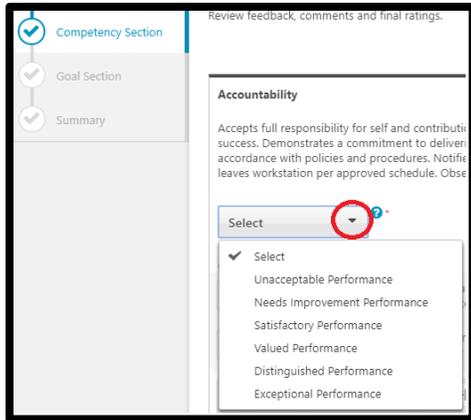
    b. You can select the help icon to the right of the dropdown to display a description of all ratings. DO NOT edit or add Year-End Interim Review Comments, only apply rating.


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 a dropdown labeled **Select.** Use the dropdown to select a rating for each goal.
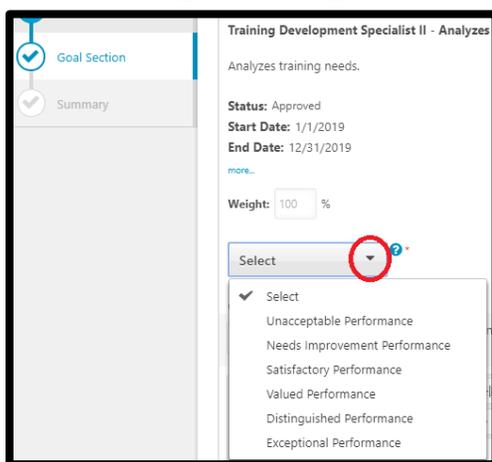
    b. You can select the help icon to the right of the dropdown to display a description of all ratings. DO NOT COMMENT, only apply rating.

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 next line supervisor before you can review the overall rating.

8. **Summary Section-** This screen provides you with a breakdown of the employees rating. The overall rating is calculated on a 50-50 split. Competencies are equally weighted totaling 100%, this is done automatically in the system. Goals will use their assigned weights also equaling 100%. Each section is worth 50% therefor, the final overall rating is an average of the two sections. Select **Submit** to advance the Final Performance Evaluation to the next line supervisor for review.
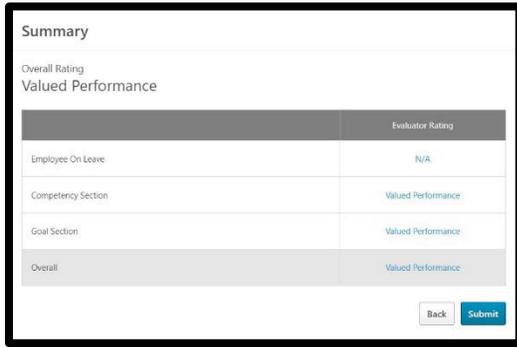
Evaluator Discussion and Acknowledgment Step for Final Performance Evaluation

The Evaluator Discussion and Acknowledgment step is intended for the evaluator to meet and discuss with the employee their performance from January 1st thru December 31st and review their final rating, in a required meeting. This is a required step and will not advance until completed. The evaluator should not submit this step until after the required meeting with the employee. If the step is submitted the evaluator must contact their agency Performance Administrator to have the step reopened for edits. E-mail notification will be sent to the evaluator once 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**.

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 next line supervisor or to the employee. If you utilize the reopen feature, please close the task, and do not submit, if you select submit the task will not workflow back to you to review any additional comments left by the employee. When a task is reopened the task will show in your worklist and in the next line supervisor's or employee's worklist at the same time. It is imperative that you communicate outside the system when the task is reopened.

3. **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 and make any final adjustment, select **Next**.

4. **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 and make any final adjustment, select **Next**.

5. **Summary Section**- This screen provides you with a breakdown of the employees rating. The overall rating is calculated on a 50-50 split. Competencies are equally weighted totaling 100%, this is done automatically in the system. Goals will use their assigned weights also equaling 100%. Each section is worth 50% therefor, the final overall rating is an average of the two sections, select **Next**.

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 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 tile, 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

Employee Annual Performance Planning

Self Review

The Self Review step is intended to allow the employee the opportunity to provide feedback and suggestions to their Annual Performance Plan. This 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 to the evaluator 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 MyPERFORMANCE Button.

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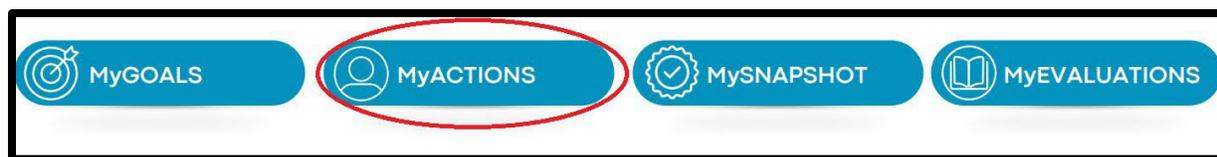
3. You will have a task labeled Complete your Annual Performance Planning, select **Launch**.

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. The system allows three (3) attachments per Employee Evaluation.
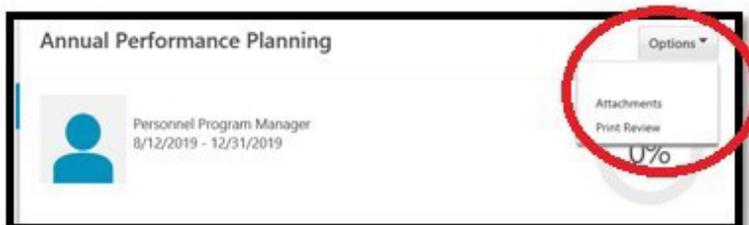
6. **Competency Section**- Review the instructions for the Annual Performance Planning and scroll down to review your core competencies. The comment box provided for each competency is optional and intended for you to provide feedback to your evaluator. Select **Save and Continue**.

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

8. From the goals page, you will see a yellow banner identifying 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 for each goal is optional and intended for you to provide any feedback to your evaluator.
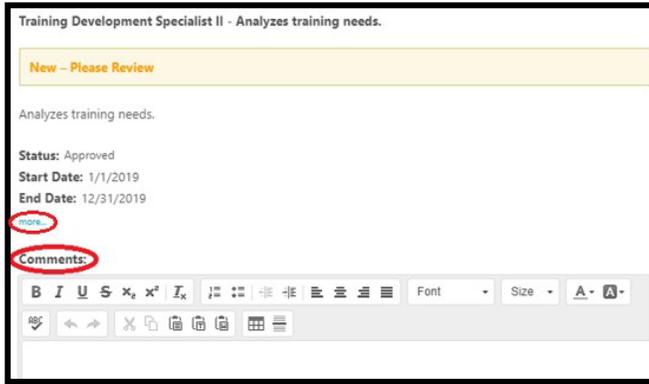
c. Once all goals and tasks have been reviewed, select **Submit**. You will receive a second submit notice, select **Submit**. This will automatically follow step progression and advance to the evaluator for Goal Review Confirmation.

Employee Acknowledgment

The Employee Acknowledgement step is to certify that you have met with your evaluator to review your Annual Performance Plan. The Employee Acknowledgment step is a required step, and the task will not show as completed until the step is submitted. E-mail notification will be sent to the employee once the task is assigned and after 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 has been attached or you may add an attachment to the Annual Performance Plan, if desired. The system allows up to three (3) attachments per Employee Evaluation.
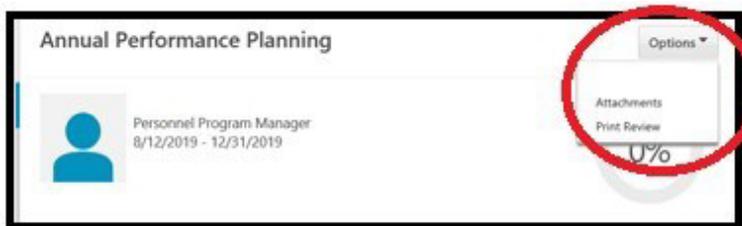
3. Each task will start with an overview, please read the Annual Performance Planning overview carefully and select **Get Started**.

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

5. **Goal Section**- 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. **Employee Signature Section**- 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.**

   If an employee chooses to select "Decline To Sign", the task must still be completed by selecting **Submit.**
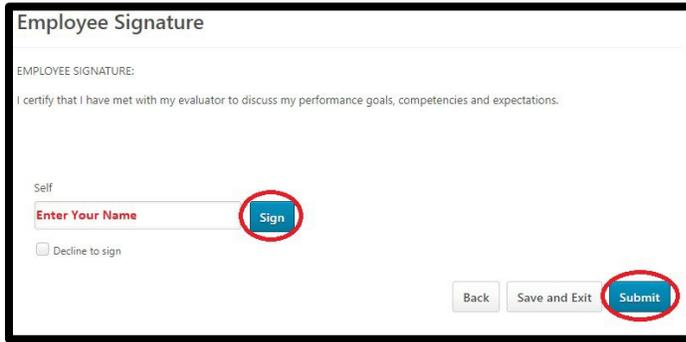
The Annual Performance Plan is now complete!

Employee Mid-Year Interim

Self Review

The Self Review step is intended to allow the employee the opportunity to provide feedback regarding their performance from January 1st to June 30th. The task is launched early July and 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 MyPERFORMANCE Button.
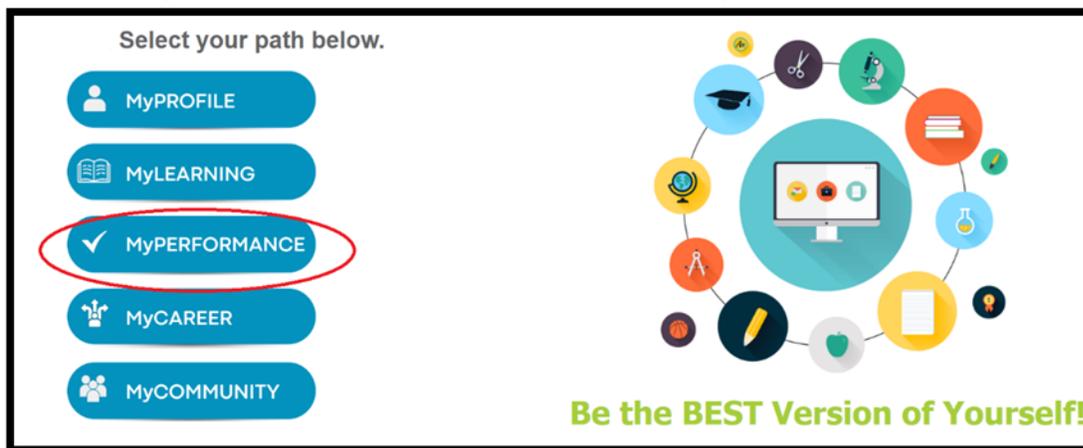
2. Select MyACTIONS.
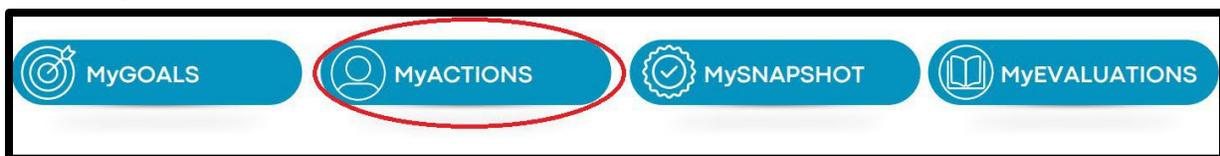
3. Select **Launch** to Complete your Mid-Year Interim Review. Please note that once the action has been assigned to you, you have five (5) days to review, or it will automatically route to your

evaluator.

4. On the right-hand side of your screen, you will notice a dropdown labeled **Options**. Use this to view any documentation or you may add an attachment to the Mid-Year Interim, if desired. The system allows up to three (3) attachments per Performance Evaluation.
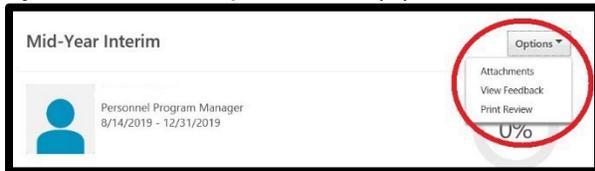
5. Each task will start with an overview, please read the Mid-Year Interim Review overview carefully and select **Get Started.**

6. **Competency Section**- 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.
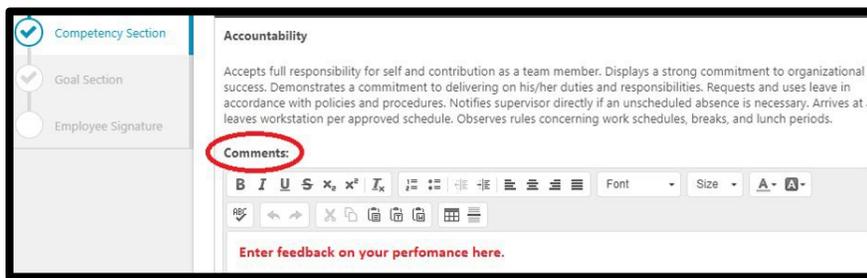
7. After you have reviewed and commented on all competencies, select **Save and Continue**.

8. **Goal Section**- Review the instruction for the employee.

9. 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.
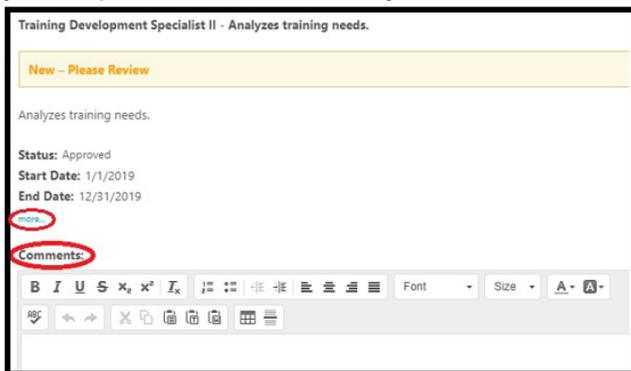
   c. Once all goals have been reviewed and you have left comments, select **Submit**.

d. Your task will automatically follow step progression and advance to the evaluator for review. There is no acknowledgement step for the Self Review.

Employee Acknowledgment

The Employee Acknowledgement step is to certify that you have met with your evaluator to review your Mid-Year Interim. This step is a required and the task will not show as completed until the step is submitted. E-mail notification will be sent to the employee once the task is assigned and 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 has been added.
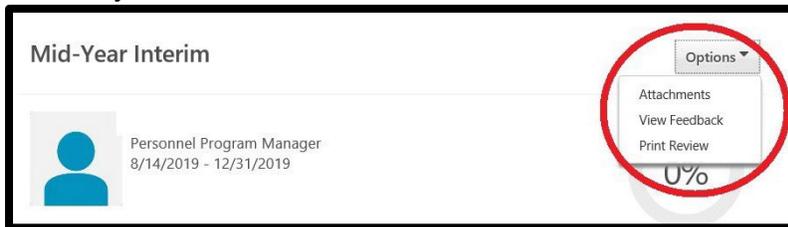
3. Each task will start with an overview, please read the Mid-Year Interim Review overview carefully and select **Get Started**.

4. **Competency Section**- 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 you are visible, select **Next.**

5. **Goal Section**- 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. **Employee Signature Section**- 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**.

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 Review/Final Performance Evaluation

The Year-End Interim Review/Final Performance Evaluations are two separate performance process that are launched together in one task. During this phase, the evaluator and employee are required to complete two acknowledgement steps. It is important to remember that the evaluator will not be able to assign a final rating until the employee completes their first acknowledgement step.

Employee Self Review for the Year-End Interim Review

The Self Review step is intended to allow the employee the opportunity to provide feedback regarding their performance from July 1st to December 31st. The task will launch early January and 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 when then the task becomes past due.

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

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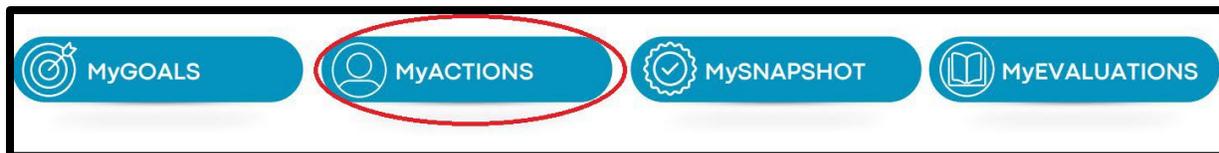
3. Select **Launch** next to Complete your Year-End Interim/Final Performance Evaluation.

   a. 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 Review, if desired. The system allows up to three (3) attachments per Performance Evaluation.
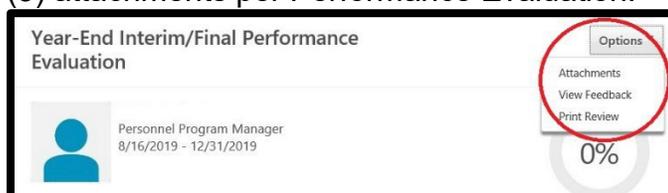
4. Each task will start with an overview, please read the Year-End Interim Review overview carefully and select **Get Started.**

5. **Competency Section**- Review the instructions for the Year-End Interim Review 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.
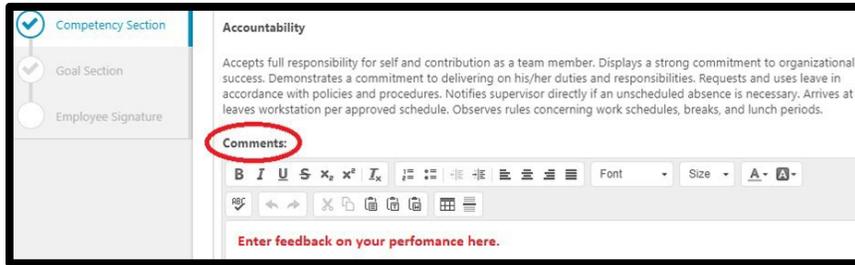
6. After you have reviewed and commented on all competencies, select **Save and Continue**.

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.

8. After you have reviewed and commented on all goals, select **Save and Continue**. If you choose, **Submit** the task will automatically advance to the evaluator without reviewing the Summary Section.

9. **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 advance the task to your evaluator for review.

Employee Acknowledgment for the Year-End Interim Review

The Employee Acknowledgement step is to certify that you have met with your evaluator to review your Year-End Interim Review. This 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 when then the task becomes past due.

1. Once your evaluator has completed their Discussion and Acknowledgment step, 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 attached documentation that your evaluator has attached, or you may add an attachment to the Year-end Interim, if desired. The system allows up to three (3) attachments per Performance Evaluation.

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

4. **Competency Section**- Review the instructions for the Year-End Interim Review 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. **Goal Section**- 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. **Summary Section**- This screen is blank as there are no ratings associated with the Year-End Interim Review, select **Next.**

7. **Employee Signature Section**- 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 Review/Final Performance Evaluation to your evaluator to apply the final ratings.
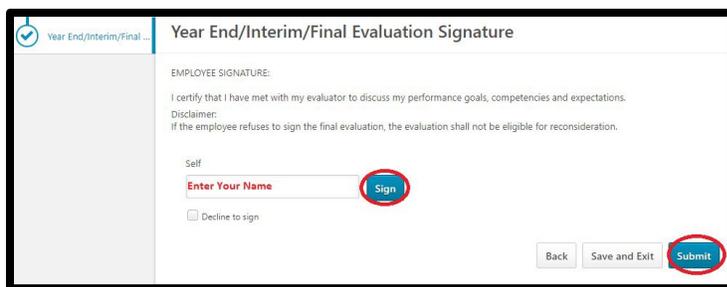

If the employee chooses to select "Decline To Sign", the task must still be completed by selecting **Submit.**

Final Evaluation Employee Acknowledgment

Once the Evaluator has assigned a rating to each competency and goal the task will workflow back to the employee for the Employee Acknowledgment. This 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 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 a breakdown of the rating. The overall rating is calculated on a 50-50 split. Competencies are equally weighted totaling 100%, this is done automatically in the system. Goals will use their assigned weights also equaling 100%. Each section is worth 50% therefor, the final overall rating is an average of the two sections, select **Submit**.

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

   a. If the employee chooses to select "Decline To Sign", the task must still be completed by selecting Submit.

   b. If the employee chooses Decline to Sign on their Final Evaluation, they will not be able to file for reconsideration.

The Final Performance Evaluation is now complete!

Next Line Supervisor

Next Line Supervisor Annual Performance Planning Review

The Next Line Supervisor Review is intended to allow the next line the opportunity to review the Performance Plan to ensure the competencies, goals and task align with the employee's position description and the mission of the organization. If edits are needed, the next line supervisor should communicate outside of the system and utilize the reopen feature to assign the task back to the evaluator or employee. This is a required step and will not advance until completed. E-mail notification will be sent to the next line supervisor once the task is launched and when then the task becomes past due.

1. From the MyPURPOSE Home screen, select the Performance Button.
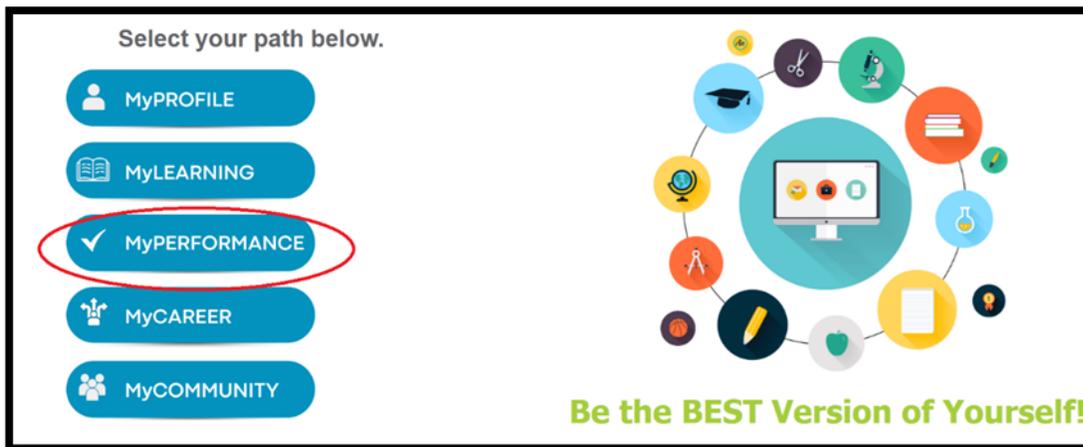
2. Select MyACTIONS.

3. Select **Launch** next to your Next-Line Supervisor Annual Performance Planning task, you will have a 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 evaluator 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 other user's worklist 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. The system allows up to three (3) attachments per Employee Evaluation.

6. **Competency Section**- Review the instruction for the Annual Performance Planning and scroll down to review the core competencies. This section is read only, comments from employee and evaluator will be visible. 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**- To certify that you have reviewed the Annual Performance plan 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

The Next Line Supervisor Review is intended to allow the next line supervisor to review comments left by the evaluator and employee. If edits are needed, the next line supervisor should communicate outside of the system and utilize the reopen feature to assign the task back to the evaluator or employee. This step is optional and will automatically advance to the evaluator after five (5) days. E-mail notification will be sent once the task is launched.

1. From the MyPURPOSE Home screen, select the MyPERFORMANCE Button
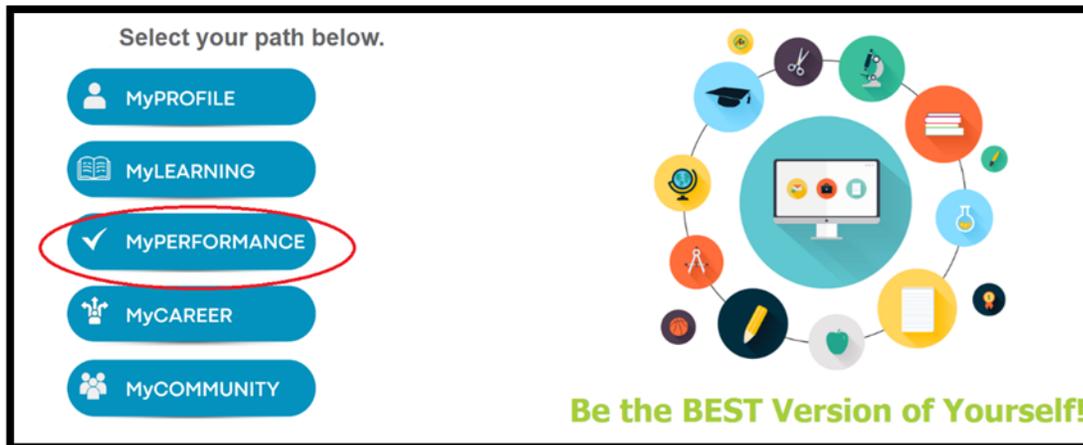
2. Select MyACTIONS Button.

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. The system allows up to three (3) attachments per Employee Evaluation.
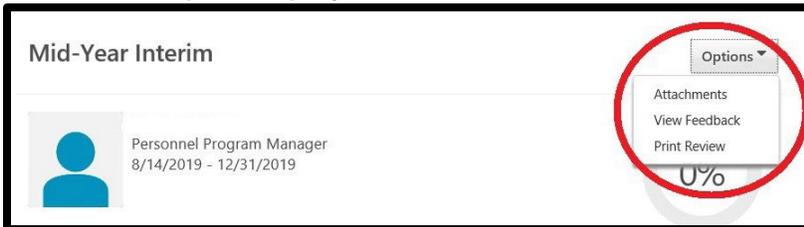
5. Each task will start with an overview, please read the Mid-Year Interim Review overview carefully and select **Get Started**.

6. You will notice beside Get Started you have a **Reopen Step** option. Use this if you need to return the task to the evaluator or 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 employee's and evaluator's worklist at the same time. It is imperative that you communicate outside the system when the task is reopened.

7. **Competency Section**- 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.**

8. **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.**

9. **Next Line Supervisor Signature Section**- To certify that you have reviewed the Mid-Year Interim Review 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.
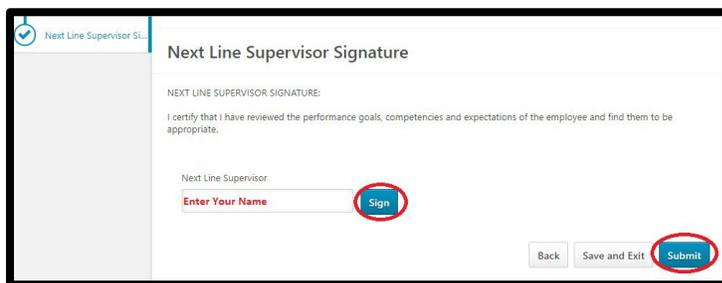
Next Line Supervisor Year-End Interim/Final Performance Evaluation

The Year-End Interim/Final Performance Evaluation are two separate processes launched together in one task. During this phase, the evaluator and employee are required to complete two acknowledgement steps. It is important to remember that the evaluator will not be able to assign a final rating until the employee completes their first acknowledgement step.

Year-End Interim Review/Final Performance Evaluation, Next Line Supervisor Review

The Next Line Supervisor Review is intended for the Next Line to review comments left by the employee and evaluator during the Year-End Interim Review and to ensure that the rating assigned by the evaluator is appropriate. This step is required and will not advance in workflow until completed. E-mail notification will be sent once the task is launched and when then the task becomes past due.

1. From the MyPURPOSE Home screen, select the MyPERFORMANCE Button.
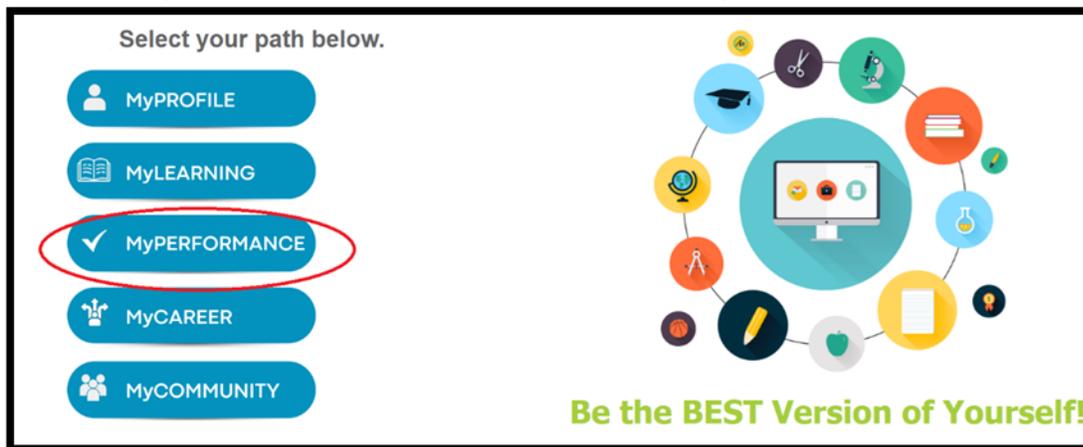
2. Select MyACTIONS.
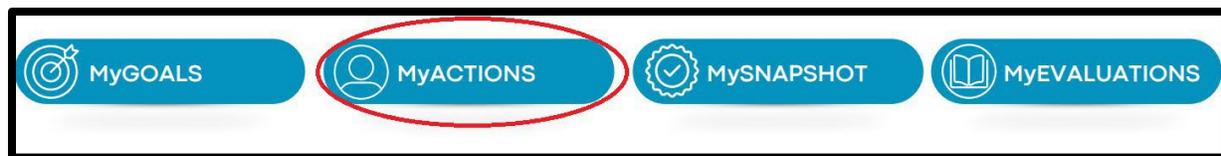
3. Select **Launch** next to Next Line Supervisor Year-End Interim/Final Performance Evaluation, you will have separate tasks for each employee.


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 evaluator or to the employee. If you utilize the reopen feature, please close the task, and do not submit, if you select submit the task will not workflow back to you to review any additional comments left by the evaluator or employee. When a task is reopened the task will show in your worklist and in the next line supervisor's or employee's worklist 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 a breakdown of the employees rating. The overall rating is calculated on a 50-50 split. Competencies are equally weighted totaling 100%, this is done automatically in the system. Goals will use their assigned weights also equaling 100%. Each section is worth 50% therefor, the final overall rating is an average of the two sections. Select **Submit**.

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 Discussion and Acknowledgement step.

Other Performance Processes

New Position Performance Plan

If an employee's position or job title changes during the review period, the evaluator must create a new Position Performance Plan no later than thirty (30) calendar days after the start date of the change unless otherwise directed by the appointing authority and approved by the Personnel Cabinet or directed by the Personnel Cabinet. Per Regulation, you must supervise an employee sixty (60) calendar days to apply the rating and complete the Final Evaluation. If you need assistance on assigning a co planner, please reach out to your agency performance management administrator.

Do not create a New Position Plan if you are missing an employee's Annual Performance Planning Task after the January launch, reach out to your agency Performance Administrator for guidance.

If you receive a transfer employee during a performance phase, once the KHRIS action is approved,

any active performance phase launched will automatically update and reassign to you, as the new manager in workflow. The most appropriate supervisor to comment on employee performance should complete the review, and you may need to set the previous manager as a co planner or contact your agency Performance Administrator for assistance.

- If you receive an employee after January 31st, ensure that the initial Annual Performance Plan has been completed by the prior evaluator. If it is incomplete, work with your agency Performance Administrator for assistance.

- If you receive an employee after July 31st, ensure that the Mid-Year Interim Review has been completed by the prior evaluator. If it is incomplete, work with your agency Performance Administrator for assistance.

How to ensure a previous performance task is completed

1. From the MyPURPOSE home screen, select the MyPERFORMANCE Button.
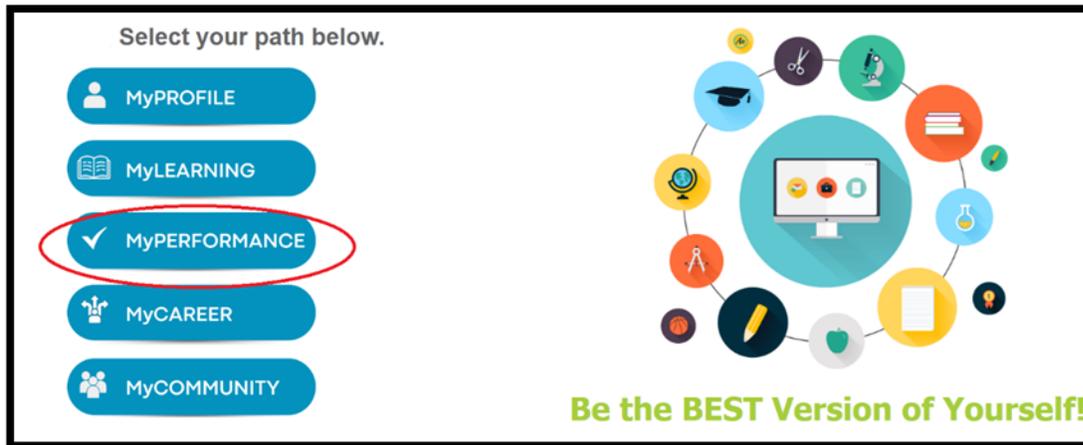

2. Select **MySNAPSHOT**.

3. From the MySNAPSHOT page, select **View Team.**
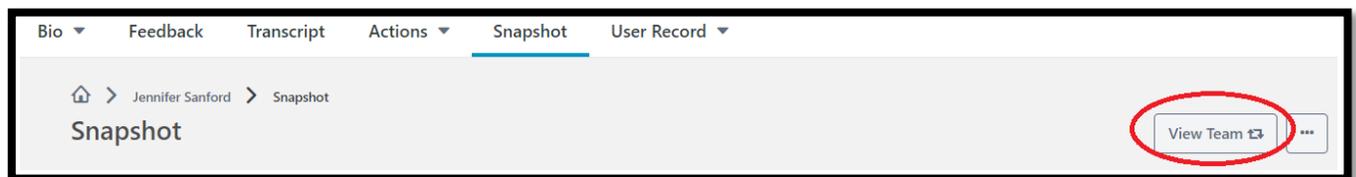
4. Select the employee's name to launch their bio page.
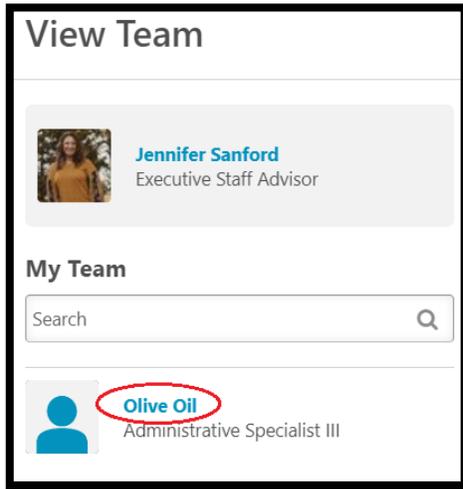
5. Select the Review tile.
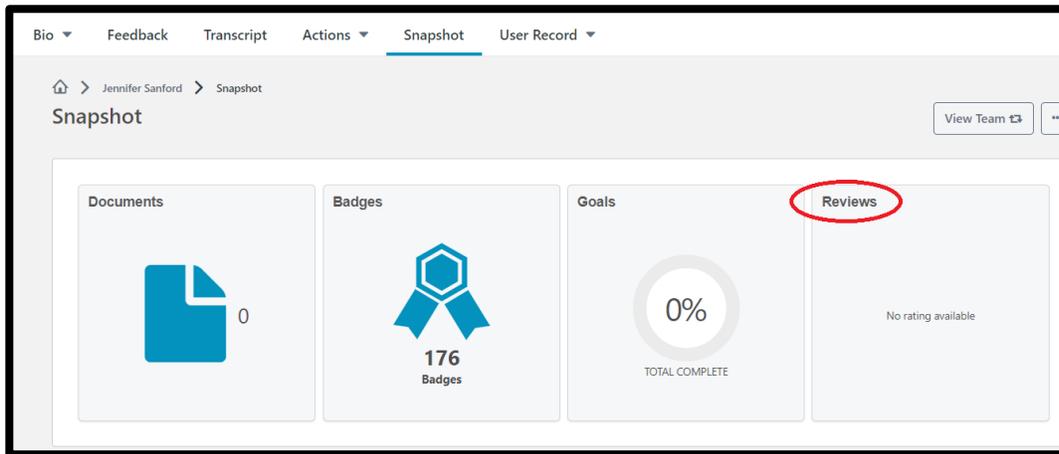
6. Review the current year's performance reviews to ensure they are complete. If the status is not complete, you should assign the previous evaluator as a co planner. The most appropriate evaluator should complete the task. Contact your agency Performance Administrator for assistance.
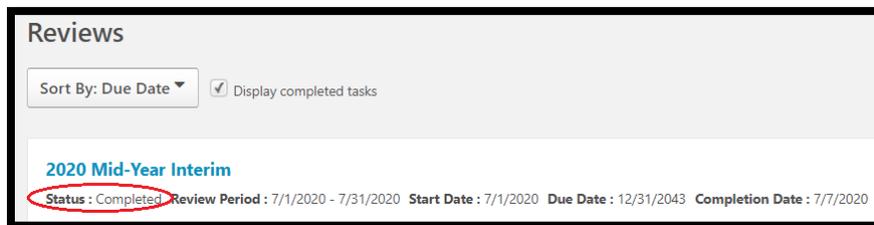
Guideline to completing a New Performance Plan

Any employee who changes positions or job titles <u>after</u> June 1st must have their Mid-Year Interim Review completed prior to the New Position Performance Plan. The evaluator should meet, discuss, and document the employee's new expectations and goals outside of the system. This means the evaluator *would not* launch a New Position Performance Planning task within the system at this time. Launching and completing a New Position Plan will result in the cancellation of previous goals and prevent the evaluator from leaving comments during Mid-Year Interim Review. Once the Mid-Year Interim review is complete, the evaluator should launch and complete the New Position Performance Plan in MyPURPOSE. If the employee changes positions or job titles on or before June 1st, a New Position Performance Plan must be completed within 30 days.

- If an employee changes position or job titles on or before June 1st, a New Position Performance Plan should be completed prior to completing the Mid-Year Interim Review.

- If an employee changes positions or job titles after June 1st, the Mid-Year Interim Review should be completed with the previous goals and a New Position Performance Plan created afterwards.

Any employee who changed positions or job titles <u>after</u> November 1st must have their Year-End Interim Review/Final Evaluation completed by the former supervisor. The evaluator should meet, discuses and document the employee's new expectations and goals outside of the system. This means the evaluator *would not* launch a New Position Planning task within the system. Launching and completing a New Position Plan will result in the cancellation of previous goals and prevent the evaluator from rating appropriate goals during the Year End Interim Review/Final Evaluation phase. The employee's new expectations/goals will be captured when the new performance year commences in MyPURPOSE, by use of the Annual Performance Planning task.

- If an employee changes positions or job titles on or before November 1st, a New Position Performance Plan should be completed before completing the Year-End Interim Review/Final Evaluation.

- If an employee changes positions or job titles after November 1st, the Year-End Interim Review/Final Evaluation should be completed by the former supervisor based on the old goals and the New Annual Performance Plan should reflect the new title/goals.

To complete a New Position Performance Plan
1. From the MyPURPOSE home screen, select the MyPERFORMANCE Button.
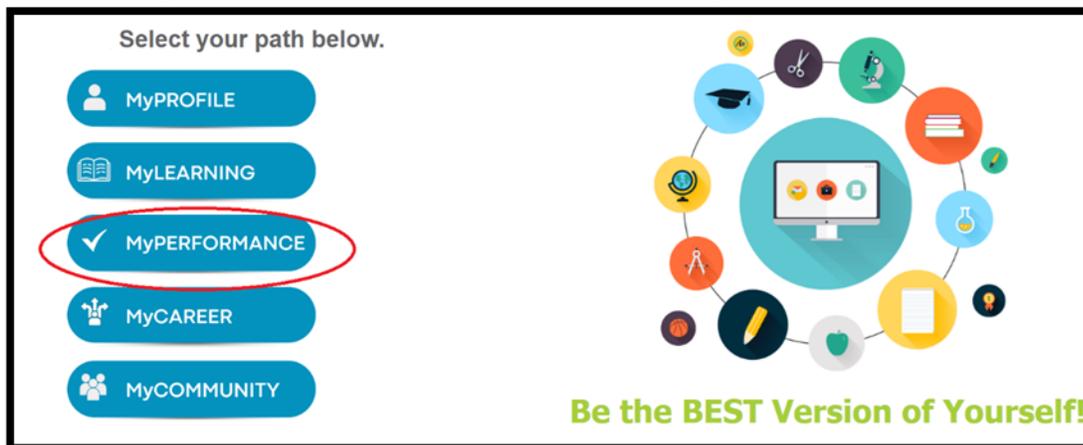
2. Select MyEVALUATIONS.

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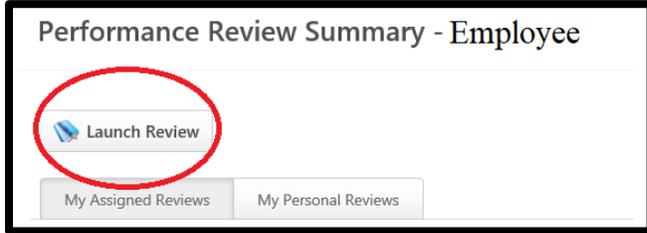
4. From the Launch Performance Review Summary screen, enter the following information and select **Launch**.

   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 title 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 page or as a task in your Actions. From the Performance Review Summary page, select **Complete Evaluator New Position Performance Planning Review.**

6. The New Position Performance Plan follows the same step progression as the Annual Performance Plan. See the Evaluator's Annual Performance Planning section, Competency Section of this manual to complete the New Position Performance Plan.

Please note that when you 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 goal.
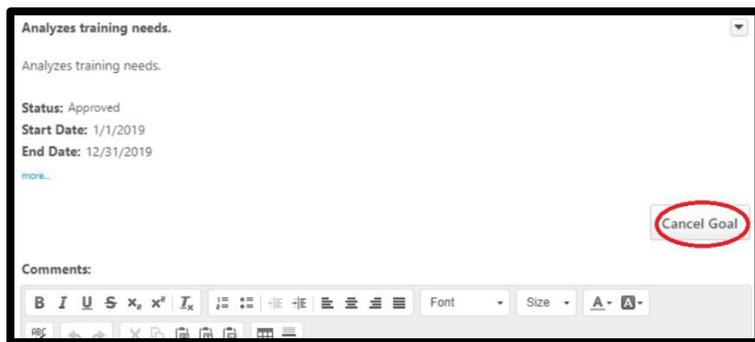
Note: If you created a New Position Performance Plan by accident or determined that one is not needed, please reach out to your agency performance administrator for next steps. Although performance review tasks and other features in MyPURPOSE, such as the MyGOALS page are integrated (if dates align), they also work independently and may require additional steps to correct or resolve an issue.

If a task needs to be removed from the system, any work completed within it will have to be "undone" manually from the MyGOALS page to ensure the next performance phase is not affected. For example, if you canceled a goal within a New Position Performance Planning task, requesting the task to be removed from the system will not undo the goal cancelation. You would need to resubmit the canceled goal from the MyGOALS page. If you created a new goal within New Position Performance Planning task, requesting the task to be removed from the system will not remove the goal from the MyGOALS page. You would need to cancel the newly created goal from the MyGOALS page to ensure it did not appear in the next performance phase. If a task needs to be removed from the system, your agency performance administrator will submit a business request to the Personnel Cabinet on your behalf.

Reconsideration

If an employee disagrees with any part of their Performance Evaluation, they may request Reconsideration. Employees are responsible for launching the Reconsideration task within five (5) working days of the Final Evaluation meeting or they are not eligible. If the employee declined to sign their Final Performance Evaluation, they are not eligible for reconsideration. If the evaluator does not respond within five (5) days, the employee may submit a written request to the appointing authority. The written request to the appointing authority shall be submitted within ten (10) working days after expiration of the time periods established in subsections (3) and (4) of this section. The agency must respond to the request for Reconsideration and comply with 101 KAR 2:190.

Evaluator and Employee are required to comply with dates and requirements in regulation 101 KAR 2:190.

Employee Reconsideration Launch

1. From the MyPURPOSE home screen, select the MyPERFORMANCE Button.
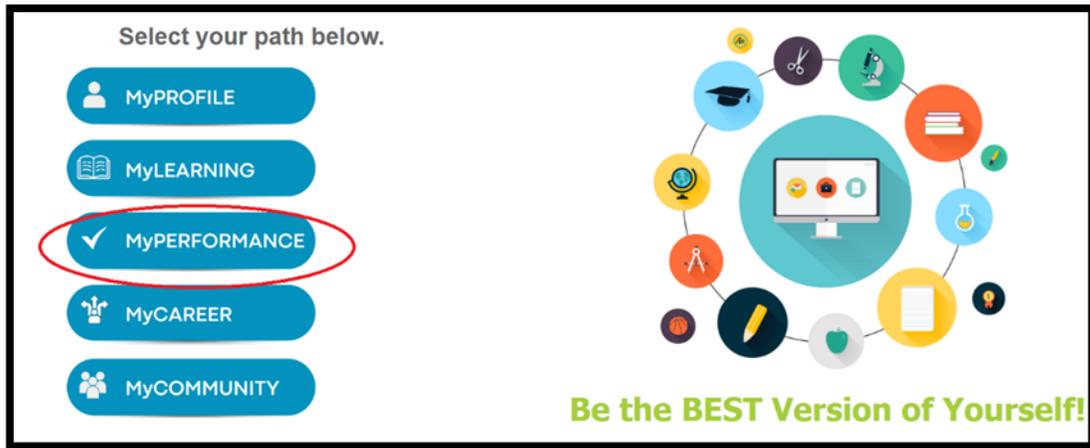

2. Select MyEVALUATIONS.

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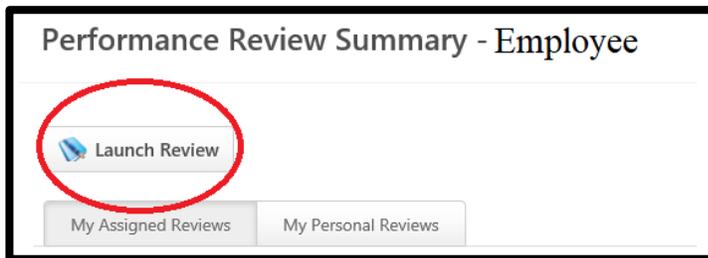
4. From the Launch Performance Review screen, enter the following information and select **Launch.**

   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?

      i. Launch Date = **Today's date**, remember this must be within five (5) days of the Evaluator
      Discussion and Acknowledgement Step

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

Reconsideration Review.

5. 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.

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

7. Provide detailed responses to both questions listed and select **Submit**. This is your last step in launching Reconsideration. This will automatically follow step progression and advance the Reconsideration task to the evaluator.

Evaluator Review

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 MyPERFORMANCE Button.
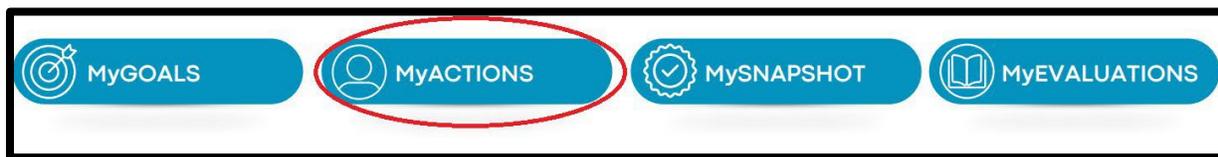
2. Select MyACTIONS.

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. 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, we encourage you to provide justification for the decision for documentation.

   b. If you choose **No, Changes WILL NOT be made,** you have the option to include comments in the additional comments section, we encourage you to provide justification for the decision for documentation.

   c. After you have selected your decision and left 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.

Next Line Supervisor Review

The next line supervisor shall complete their Next Line Supervisor step within 10 working days of receiving the Employee's Reconsideration request.

1. From the MyPURPOSE home screen, select the MyPERFORMANCE Button.
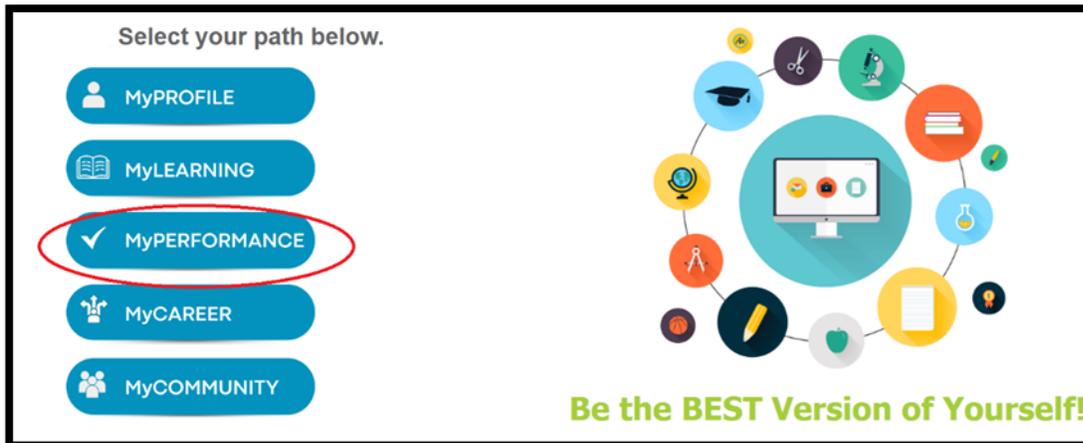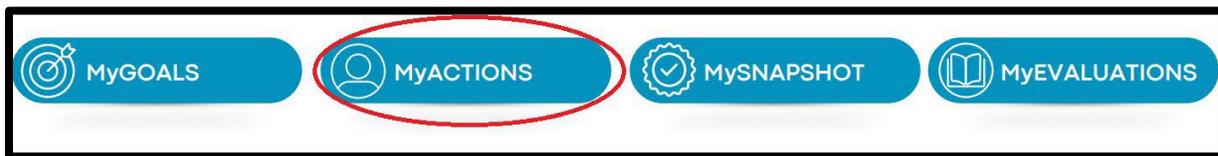
2. Select MyACTIONS.

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, we encourage you to provide justification for documentation.

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

for documentation.

 c. 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.

System Admin Re-open

The next line supervisor makes the final decision in the Reconsideration process. If the next line supervisor chooses not to accept the Reconsideration request the system administrator within the Personnel Cabinet will advance the task back to the employee for acknowledgment. If the next line agrees with reconsideration request and decides there will be a change the system administrator with the Personnel Cabinet will reopen the appropriate task back to the evaluator and advance the reconsideration task. If the next line chooses that no changes will be made, the system admin with the Personnel Cabinet will advance the reconsideration task back to the evaluator.

Evaluator Acknowledgment of Reconsideration Task

Before completing the Evaluator Acknowledgement, you should make and submit any necessary changes to the evaluation (if applicable).

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

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

6. Reconsideration Next Line Supervisor Signature- 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.

Employee Reconsideration Acknowledgment

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 follow steps 1-7 below**.**

If the evaluator and/or next line supervisor accept your reconsideration, your evaluation will be reopened to your evaluator for changes. After changes have been made, the Reconsideration task will return to your Action items in MyPURPOSE. Select **Launch** and follow steps 1-7 below**.**

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

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

3. **Reconsideration Evaluator Decision**- 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. **Reconsideration Evaluator Signature**- This screen is to verify that your evaluator has reviewed the next line supervisor's decision and made any necessary changes to your Evaluation. Select **Save and Continue**.

5. **Reconsideration Next Line Supervisor Decision**- 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. The next line supervisor makes the final decision. Select **Save and Continue**.

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

7. **Reconsideration Employee Signature-** 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 Evaluation to ensure changes that were agreed upon were made. Once you have verified the changes on your Evaluation you will acknowledge the Reconsideration task. Enter your name and select **Sign**, then select, **Submit**.

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

This completes the Reconsideration process.

Performance Improvement Plan

A Performance Improvement Plan (PIP) is an optional process that can be used to help guide and document performance improvement. It is designed to facilitate constructive discussion between the employee and the evaluator when it becomes necessary to help an employee improve performance.

The evaluator is responsible for initiating the Performance Improvement Plan within MyPURPOSE. Before initiating, the evaluator should first consult with their agency Human Resource Office and discuss with the employee. A system notification should not be the employee's first notice of the Performance Improvement Plan. An evaluator can initiate a Performance Improvement Plan at any time throughout the year. A Performance Improvement Plan consists of the initial launch, a follow up at 30 days and an additional follow up at 60 days. A PIP may be initiated multiple times throughout the year by the evaluator, if needed.

PIP Step Progression

| Performance Improvement Plan (PIP)	Step Days	Additional Info
Evaluator PIP Initiation	Required 1 day	
Next Line Supervisor Review	Required 5 days	
Employee Acknowledgment	Optional 5 days	
Evaluator Initial Follow-up *(30 days after employee sign)*	Required 10 days	You may continue to add comments throughout the 30 days
Employee Acknowledgment	Optional 5 days	
Evaluator Additional Follow-up *(30 days after employee sign)*	Required 5 days	You may continue to add comments throughout the 30 days
Employee Acknowledgment	Optional 5 days	

Evaluator

1. From the MyPURPOSE home screen, select the MyPERFORMANCE Button.
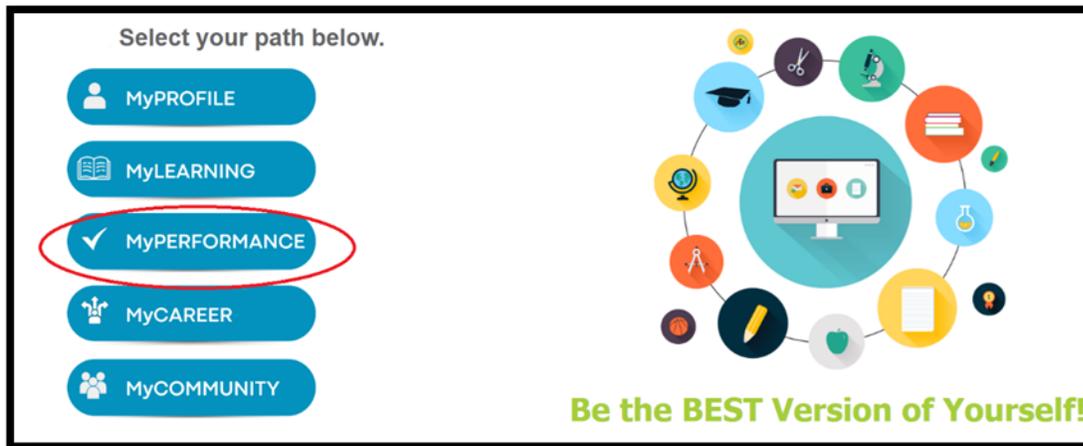
2. Select MyEVALUATIONS.
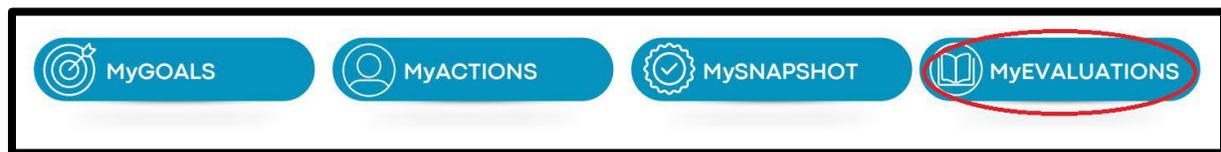
3. From the Performance review screen, select **Launch Review**.
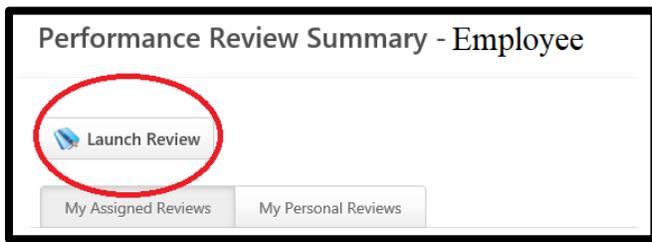
4. From the Launch Performance Review screen, enter the following information and select **Launch.**

   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.
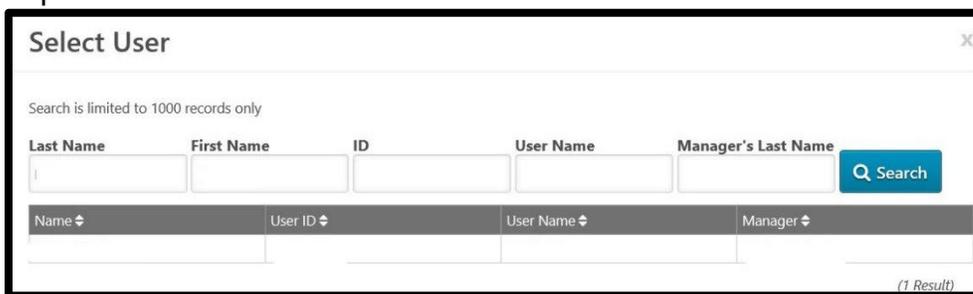

   c. Select Review Form and choose **Performance Improvement Plan**.
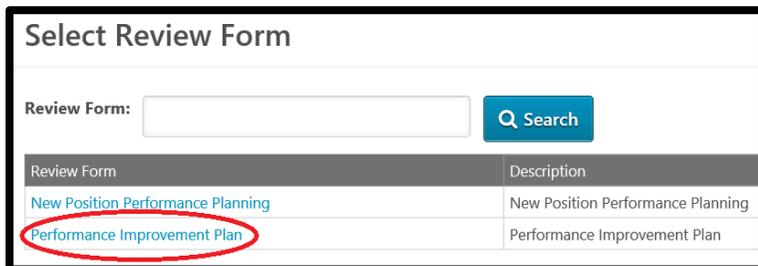
   d. Enter a title for the review. Example: PIP for (employee name)

   e. What is the Review period?

      i. From = Today's date

      ii. To = Ninety (90) days after launch date
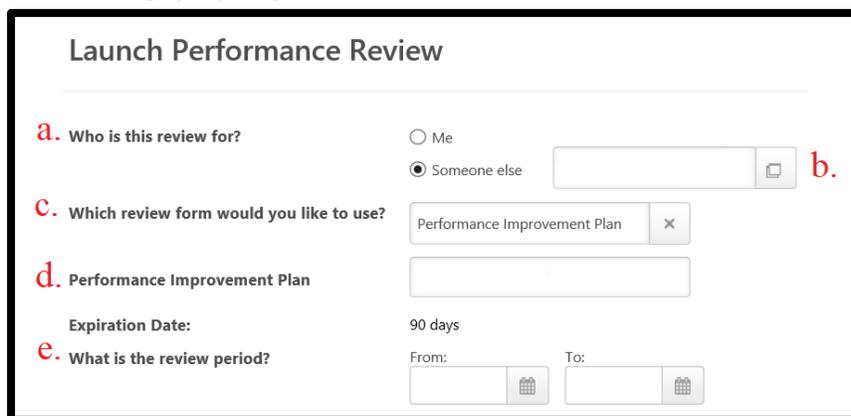
5. The Performance Improvement Plan Task will appear in your Performance Review Summary page or as a task in your actions. From the Performance Review Summary page, select **Complete Performance Improvement Plan.**

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 employee's 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 required comments describing the corrective action and how the employee can meet the expectations. Include what resources will be provided to assist the employee, if applicable. 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

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's first acknowledgment step. The initial follow up is intended to document the progress over the past 30 days, during the 30-day period. You can make comments on the employee's progress, or you can wait until the step due date. If you make changes in the task throughout the thirty (30) days, be sure to select Save and Exit and not Save and Continue.

1. When the due date arrives, select **Launch** to start the Initial Follow Up step in your action items in MyPURPOSE.

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

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

4. **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**.

5. **PIP Corrective Actions**- Review the instructions and your comments on describing the corrective action how the employee can meet the expectations. Include what resources you committed to provide to assist the employee. This section is read only, select **Save and Continue**.

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

   a. If you added comments throughout the thirty (30) days and have nothing further to add, select **Save and Exit**.

7. **PIP Evaluator Signature**- This is to acknowledge that you have discussed with the employee their performance for the last thirty (30) days as it relates to the Performance Improvement Plan. Enter your name and select **Sign** then select **Submit**. This will automatically follow step progression and route to the employee.

Evaluator Additional Follow-up

After employee initial follow up acknowledgment step is completed, 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 completes their second acknowledgment step. The Additional Follow up is intended to document progress over the last 30 days, during the 30-day period you can make comments on employee's progress, or you can wait until the step due date. If you make changes throughout the thirty (30) days, be sure to select Save and Exit and not Save and Continue.

1. When the due date arrives, select **Launch** to start to Initial Follow up step in your action items in MyPURPOSE.

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

3. **PIP Agency HR Involvement**- This is to confirm that your agency Human Resource representative has been notified, select **Next**.

4. **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**.

5. **PIP Corrective Actions**- Review the instructions and your comments on describing the corrective action, how the employee can meet expectations. Include what resources you committed to provide to assist the employee. This section is read only, select **Save and Continue**.

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

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

7. **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 route to the employee.

If additional action is needed, you may launch a second Performance Improvement Plan. When multiple Performance Improvement Plans are initiated, the previous information is visible within the new task as a read only field.

Next Line Supervisor

1. From the MyPURPOSE home screen, select the MyPERFORMANCE Button.
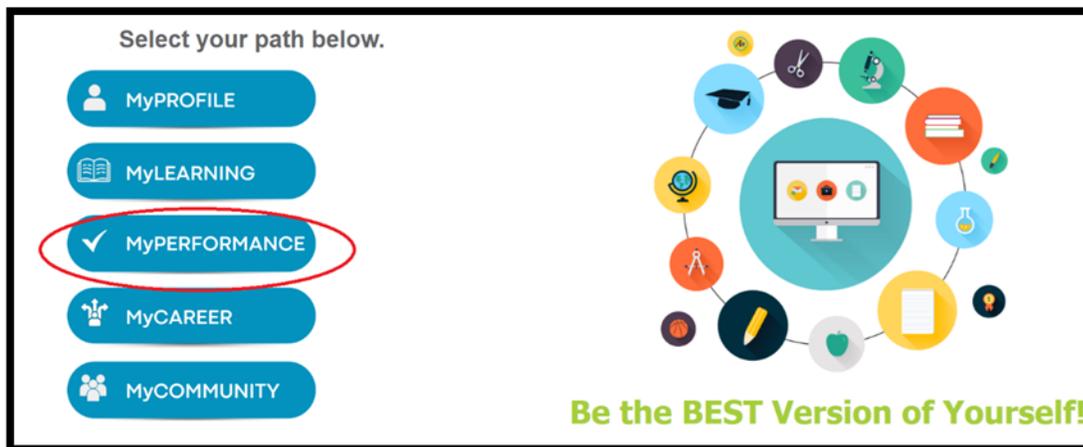

2. Select MyACTIONS.
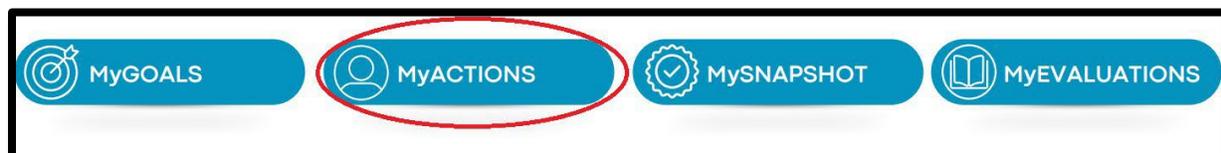
3. You will have a task for the employee who is being placed on a Performance Improvement Plan. Select **Launch** next to the task.

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

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

6. **PIP Performance Improvement Areas-** 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 describing the corrective action and how the employee can meet expectations. Include 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 MyPERFORMANCE Button.

2. Select MyACTIONS.
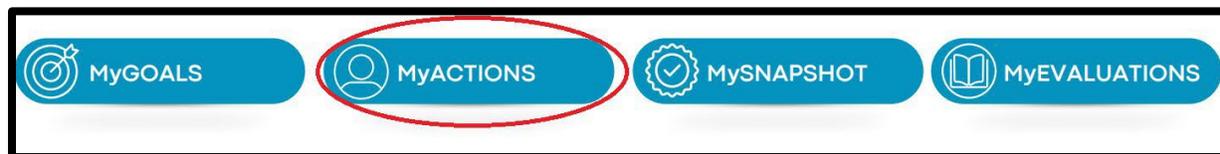
3. You will have a Self Review task for the Performance Improvement Plan, select **Launch**.

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

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

6. **PIP Corrective Actions**- This section is read only, comments from the evaluator on describing the corrective action and how the employee can meet expectations. Include what resources will be provided to assist. Select **Save and Continue**.

7. **PIP Employee Signature**- 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**.

    a. If you chose to select "Decline To Sign", the Performance Improvement Plan remains active, and the evaluator can comment on the employee's performance through the next 30 days.

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

9. **PIP Next Line Supervisor Signature**- 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.

Employee Acknowledgment to Initial Follow-up

1. After you and your evaluator have met and discussed your progress 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 describing the corrective action, how the employee can meet expectations, including 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. This section is read only, 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.

Employee Acknowledgment to Additional Follow-up

1. After you and your evaluator have met and discussed your progress 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 describing the corrective action, how you can meet expectations including 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. This section is read only, 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**.

Additional Features

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 MyPERFORMANCE Button.
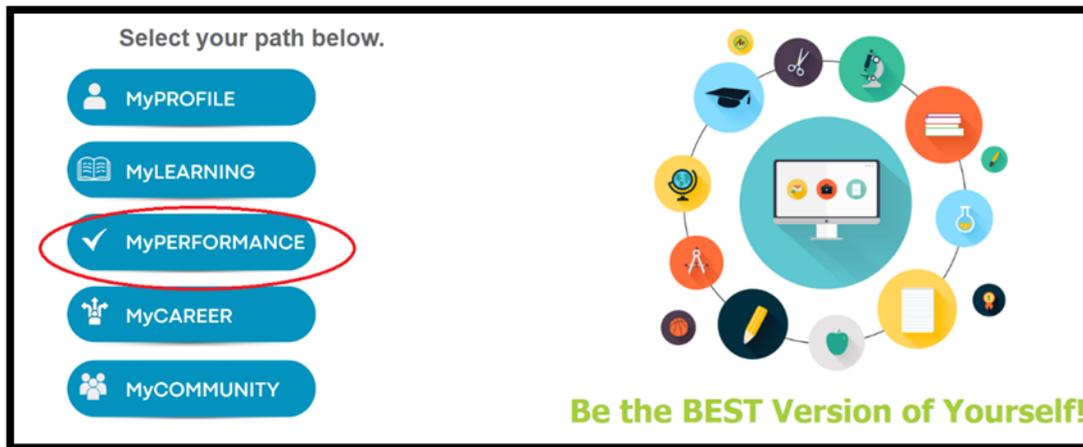

2. Select MyEVALUATIONS.
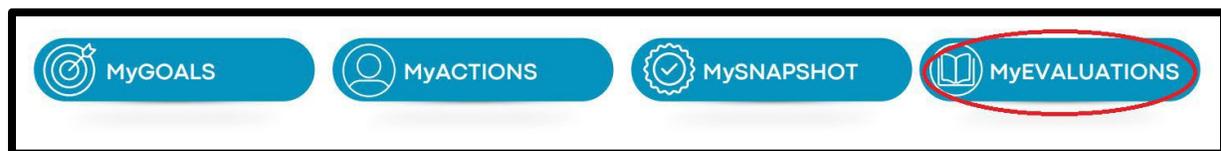
3. Within your Performance Review Summary page, select **My Personal Reviews**.
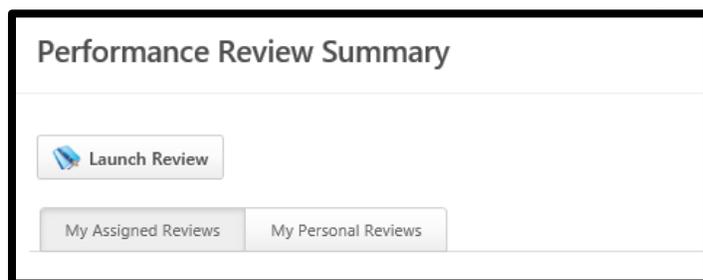
4. Select the portion of your evaluation you wish to save in PDF and/or print.

Performance Review Summary

[Launch Review]

| My Assigned Reviews | My Personal Reviews |

| Review ⇕	Review Period ⇕	Start Date ⇕	Completion Date ⇕	Task Status ⇕	Rating ⇕	Attachments
Annual Performance Planning	8/20/2019 - 12/31/2019	8/20/2019	8/21/2019	Complete	N/A	
Mid-Year Interim	8/21/2019 - 12/31/2019	8/21/2019	8/21/2019	Complete	N/A	
PIP for _____ (Performance Improvement Plan)	10/7/2019 - 12/4/2019	10/7/2019	N/A	In Progress	---	
Year-End Interim/Final Performance Evaluation	8/22/2019 - 12/31/2019	8/22/2019	8/22/2019	Complete	Distinguished Performance	

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.**

Do you want to open or save **Annual_Performance_Planning**·.pdf (314 KB) from **corporate1proxy-pilot.csod.com**?   [Open] [Save] [▾]   [Cancel]

6. Choose the location on your computer to save the document and select **Save**.
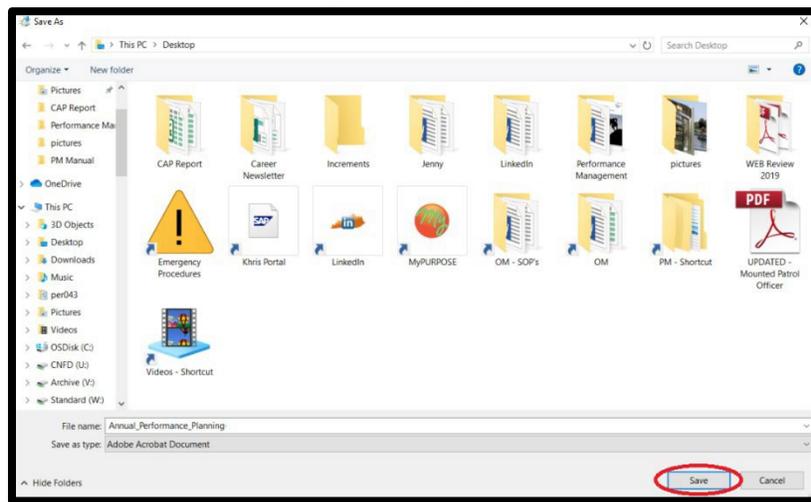
7. Retrieve the PDF document from its saved location. You can now print the PDF document if needed.
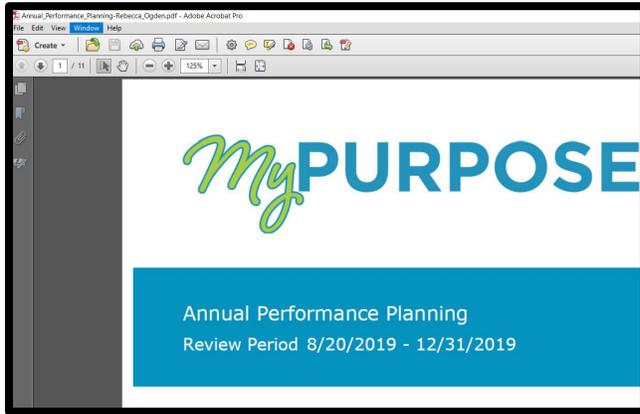
Evaluator: View completed evaluations for your team

1. From the MyPURPOSE home screen, select, **Profile** then **MyPROFILE.**

2. From the Bio page, select **Snapshot**.
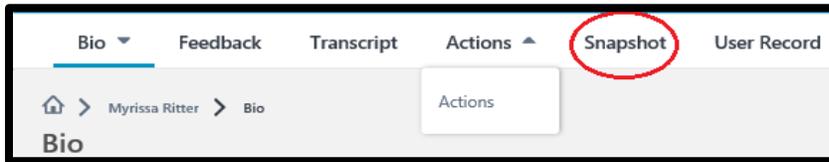

3. From the Snapshot page, select **Reviews**.
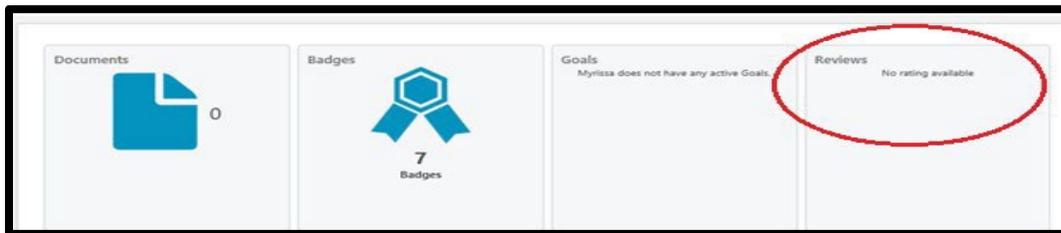
4. On the right-hand side of the screen, select **View Team**.
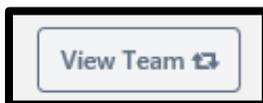
5. A pop-up window will appear with a list of all employees who report to you. Select the team member whose Performance Evaluation you wish to view and select **Done.**
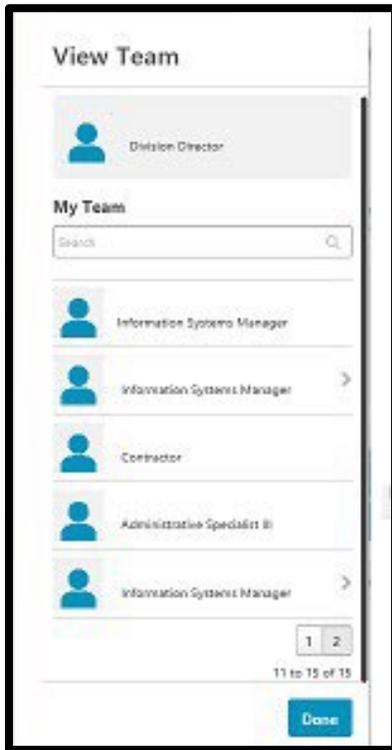
6. You are now on the Reviews Page for the selected employee. Select the phase or complete Performance Evaluation and the system will prompt you to open or save a copy of the PDF.
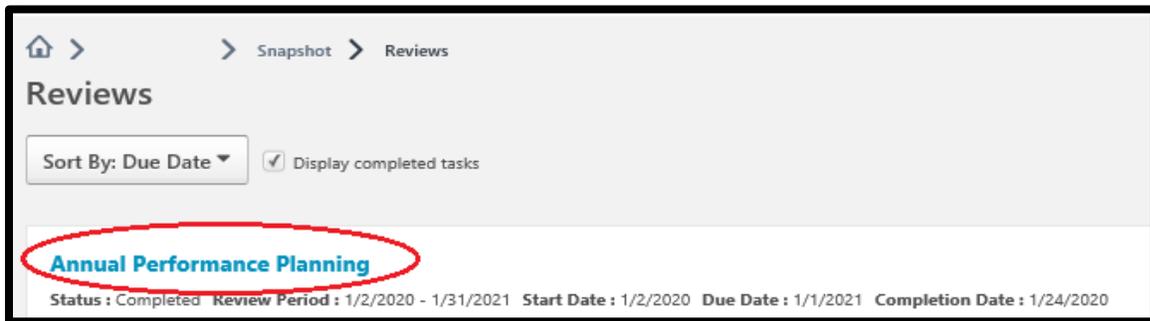
7. To view other employee Performance Evaluations, select **View Team** in the right-hand corner.
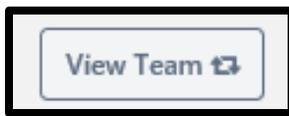
Evaluator: Assigning Goals and Tasks to multiple team members

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

Goals created within the Team Goals page will feed into an employee's Annual Performance Plan if the performance review date and goal dates align with the appropriate year.

Any edits to these goals should be made from the Team Goals page. If corrections are made to goals within a performance review task, that were originally created from the Team Goals page, will result in the evaluator needing 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".

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 MyPERFORMANCE Button.
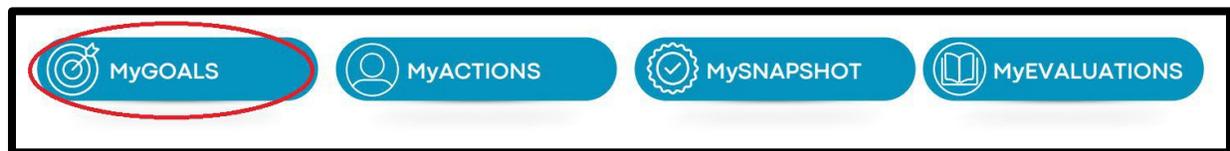

2. Select MyGOALS.

3. From the MyGoals page, select **Team Goals** then **Create**.
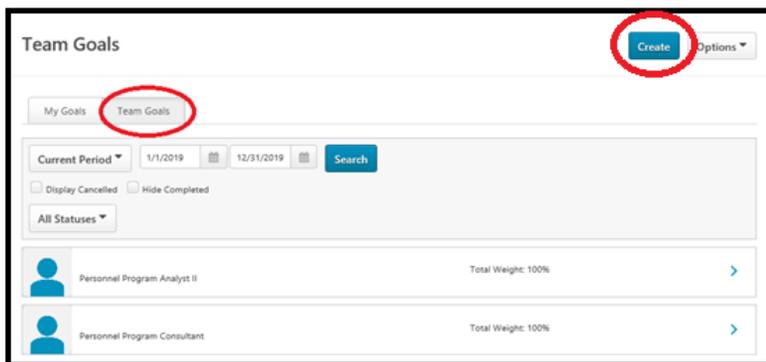
4. Use one of the two methods listed below to add the employee's goal(s).

   a. 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.
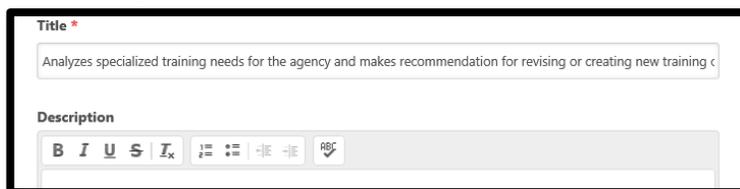
b. For your convenience, we have created a goals library with a list of possible goals for all job titles. These goals are populated from the Job Class Specification and should be modified for the employee. To utilize this feature, select **Library** located on the right-hand side of your screen.

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

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

      iii. Once imported, please remove the position title from the goal title and add specific position information to the imported goal.

      iv. The description field is available to further define the goal; this is not required.

c. 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 however, this can be used as a task within a goal.

5. Verify each goal has a start and end date that matches the review period. For example, 01/01/2021 -12/31/2021

6. **Weight each goal**. The system will accept any percentage you enter; all goals should collectively equal 100%.

7. If you used the goals library, the goal type will default to Job Responsibility. If you entered the goal manually, use the dropdown and select Job Responsibility.
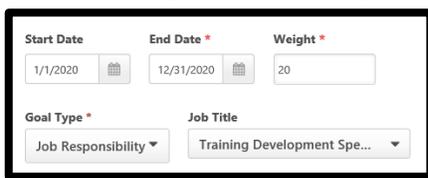
8. If you use the goals library, the job title will default with the correct job title. If you entered the goal manually, you could use the dropdown and select the correct job title. This is not required.

9. 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.

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

10. Verify that the task start and end dates match the review period and select **Done**. For example, 01/01/2021 – 12/31/2021

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

12. 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.**


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

Evaluator/Employee: Comments and Goal Modification

Commenting On Goals Throughout the Year

The evaluator and the employee can leave comments throughout the year on goals. Comments left throughout the year within the MyGoals page will be visible in performance tasks by selecting the dropdown option next to a goal, then selecting Goal Comments.

1. From the MyPURPOSE home screen, select the MyPERFORMANCE Button.

2. Select MyGOALS to add a comment.

Employee

1. From the My Goals page, select the **My Goals** tab.

2. Validate the review period.

3. Select the radio button ❯ beside the goal you wish to comment on to expand the goal description and tasks.
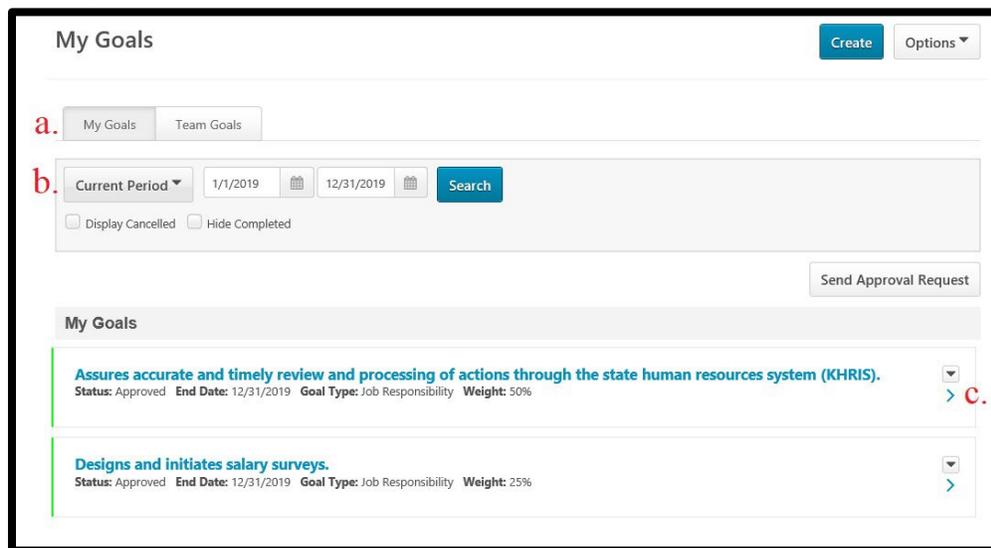
4. Select **Add Comment** and provide a comment that pertains to the selected goal within the comment box, select **Add.**
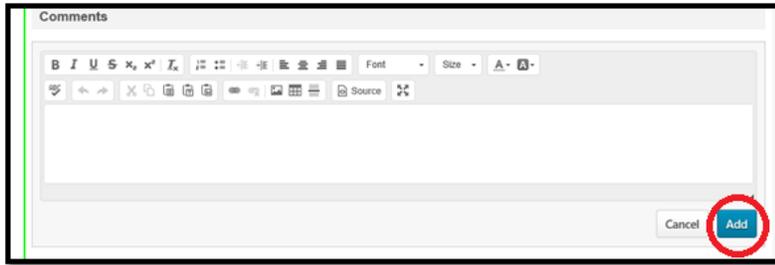
1. From the My Goals Page select the **Team Goals** tab.

2. Validate the review period.

3. To view the goals associated with the employee, select the radio button ❯ next to the employee.
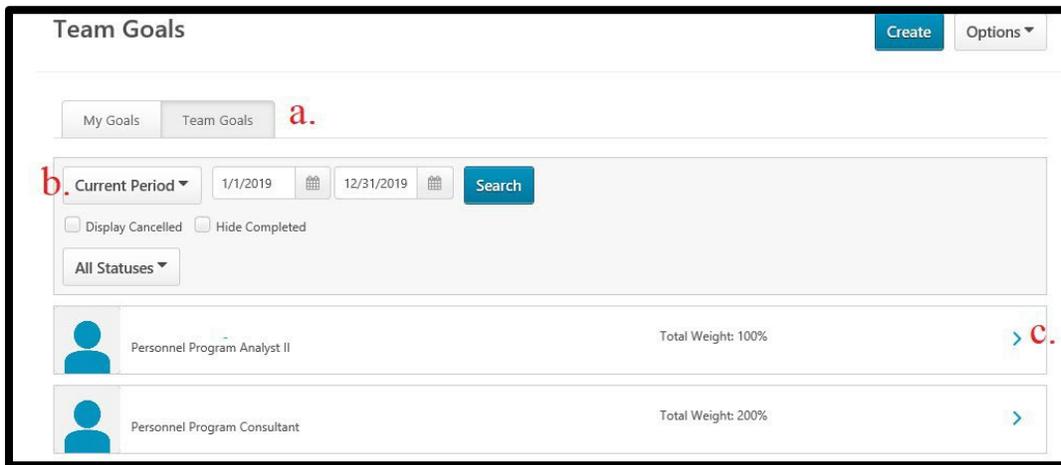
4. Select the radio button ❯ next to the goal you wish to provide a comment.
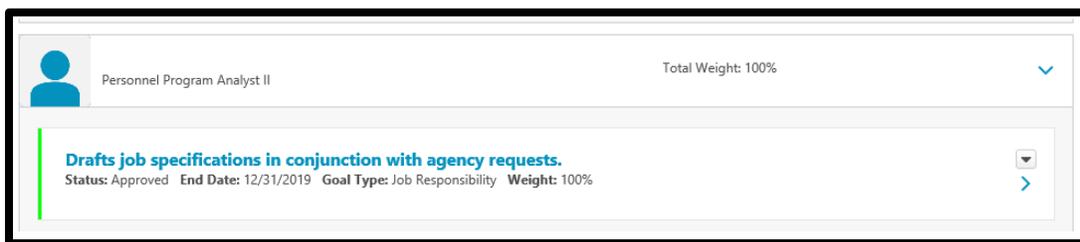
5. Select **Add Comment** and provide a comment that pertains to the selected goal within the comment box. Select **Add.**
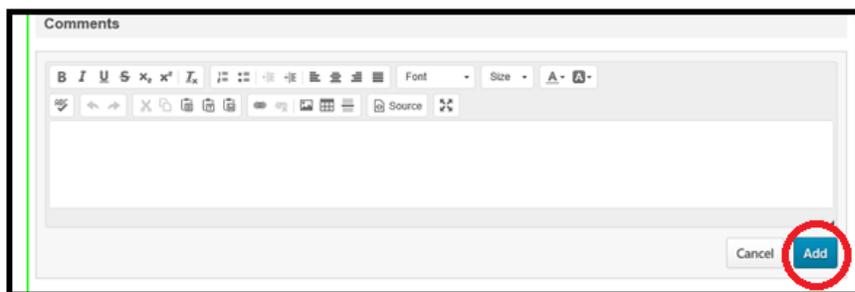
Modify an Existing Goal

Employee

Typically, employees should not modify goals, if you have suggested goal edits you should meet and discuss with your evaluator. Should you choose to make modifications in the system, any edits to the goal will need to be submitted to your evaluator for approval in MYPURPOSE. Only manager approved goals will appear in performance reviews.

*Evaluator*

1. From the My Goals Page, select the **Team Goals** tab.

2. Validate the review period.

3. To view the goals associated with the employee, select the radio button ﹥ next to the employee.
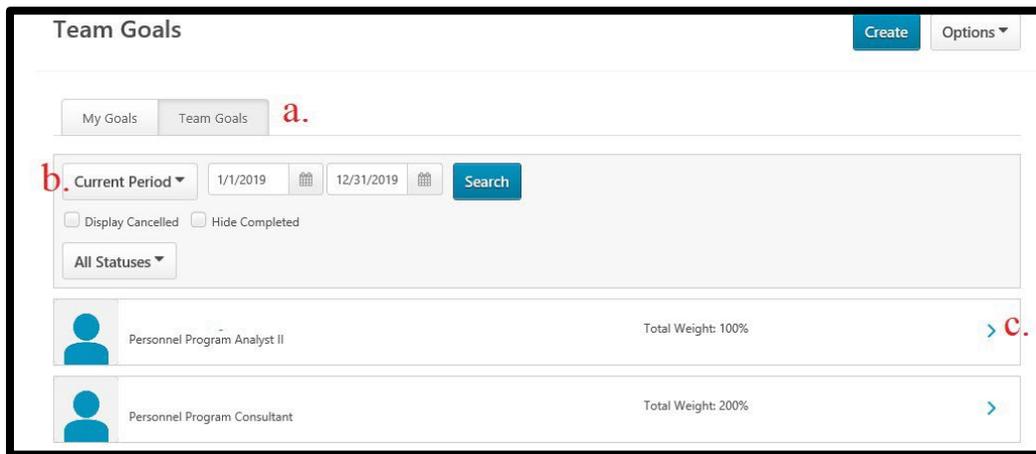
4. Select the dropdown ▼ option beside the goal you wish to modify and select **Edit**.
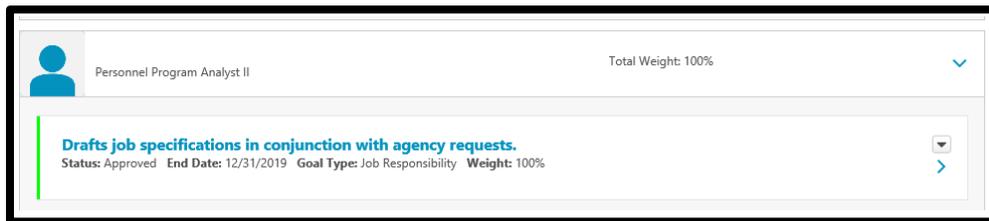
5. Make any edits to the goal and select **Submit**. An e-mail notification will be sent to the employee to notify them that a goal has been modified.

6. The evaluator should notify the employee of changes to their goals and request that the employee visit the My Goals Page to review and comment to acknowledge the change.

Evaluator/Next Line Supervisor: Adding a Co-Planner

Per regulation, 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 agency 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**.
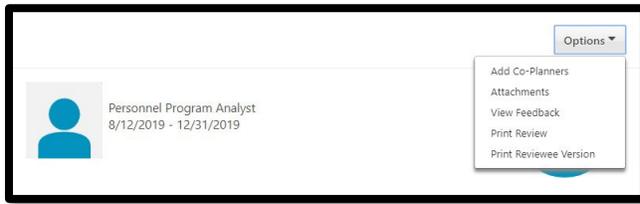
2. Select the search icon to select a Co-Planner.
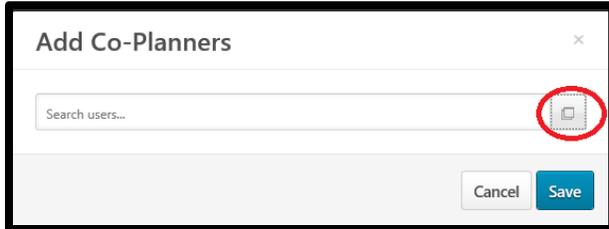
3. Enter the Co-Planner's name into the search field and key enter.
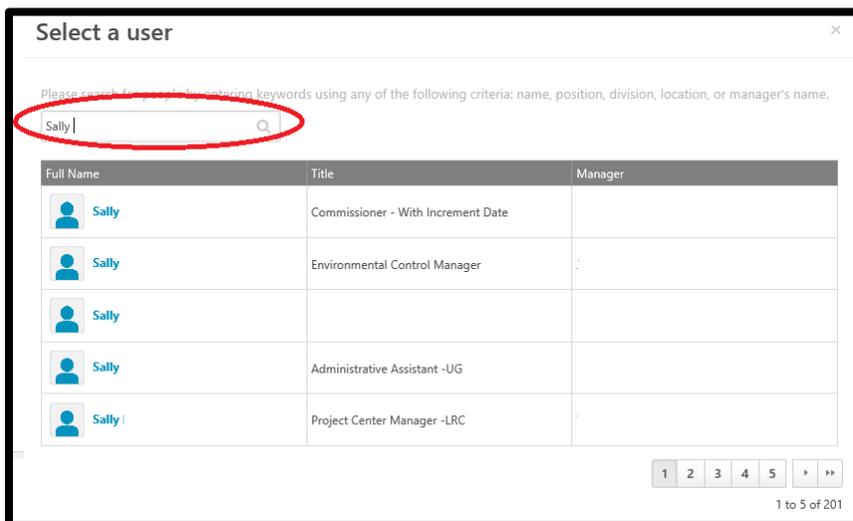
4. Select on the Co-Planner's name and select **SAVE**.
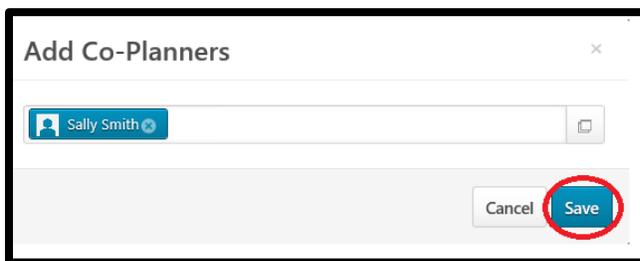
5. You have now successfully added a Co-Planner.

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 MyPERFORMANCE Button.
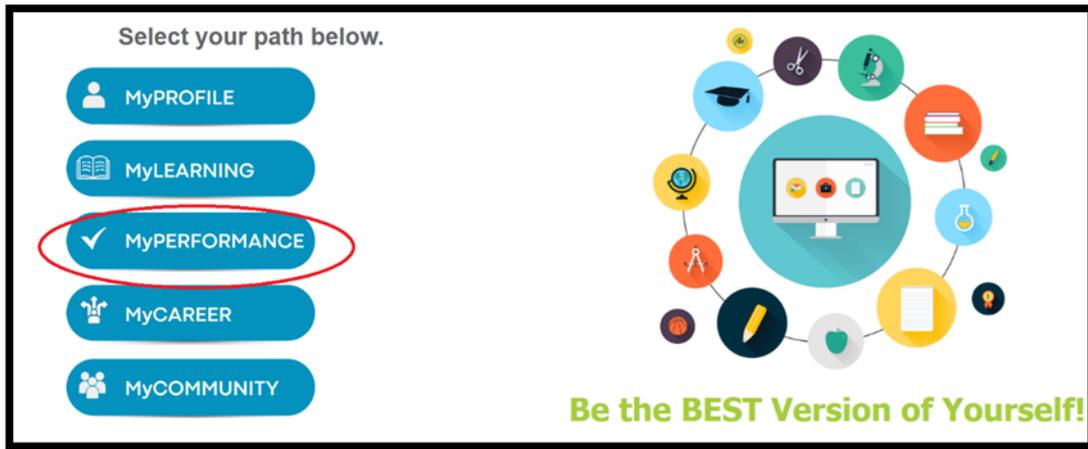

2. Select MyGOALS.

3. From the MyGoals page, select **Team Goals.**
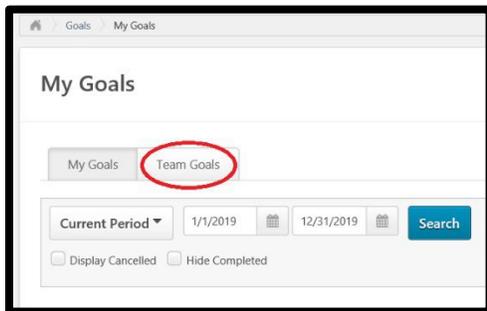
4. Validate the review period and select the radio button ❯ next to the employee whose goals you would like to copy/advance.
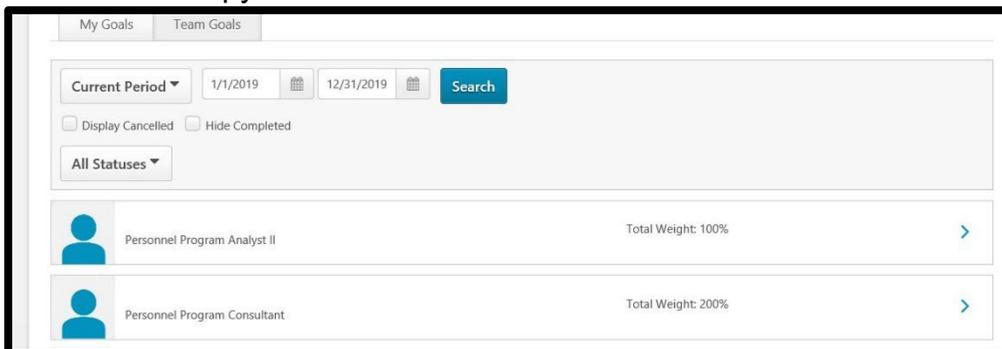
    a. Select the dropdown ▼ next to the goal you wish to copy/advance to the next Annual Performance Plan.

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

ii. If you are copying/advancing goals after January 1st, select **Advance.**
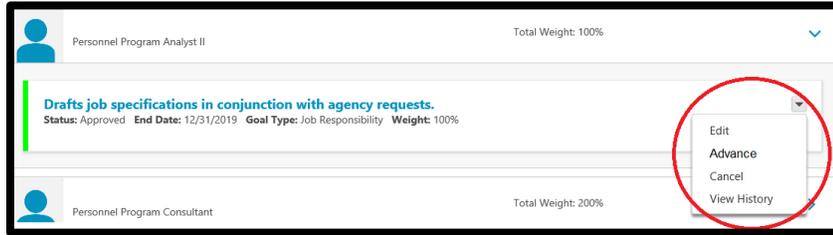
5. On the Create Goals page update the start and end date for both the goal and tasks with the appropriate review period.

6. If necessary, make change to the goal and/or tasks associated with the goal.
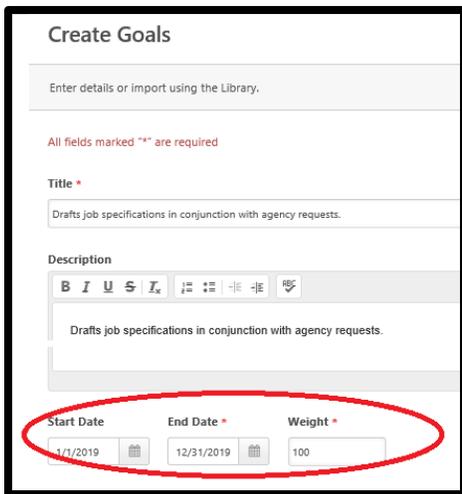
7. Under Assignment select the **Your Team radio** button and then select the **check box** next to the employee you want to assign the goal to.
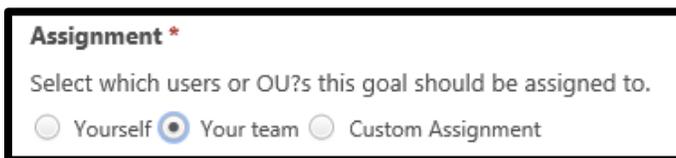
You have successfully copied/advanced the employee's goal to the next Annual Performance Planning Review Period. Once the new Annual Performance Plan is launched, any goal that you have copied/advanced will prepopulate on the employee's Annual Performance Plan.

Reopen

If a step needs to be reopened, then either the evaluator and/or next line supervisor (whomever the task is assigned to) can reopen the task to a previously completed step. The reopen button is located at the bottom of the Overview Section of each task.

When a step is reopened it is accessible to the evaluator or next line supervisor (whomever the task is assigned to) AND to whom it was reopened for. Communication is important; the evaluator or next line supervisor should not submit the step assigned to them until the reopened step is submitted. When reopened, tasks will not workflow back through any step that has been completed. Below steps that have reopen capability are noted.

A task may not be reopened twice, in other words if a next line supervisor reopens a step to the evaluator, the evaluator cannot reopen the step again. If you are having trouble reopening a step, contact your agency Performance Management Administrator.

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

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

Year-End Interim Review/Final Evaluation Step Progression	Additional Info
Self Review	
Evaluator Review	Reopen to Employee

Evaluator Discussion and Acknowledgment Interim	Reopen to Employee
Year-End Interim Review/Final Evaluation Step Progression	**Additional Info**
Employee Acknowledgment Interim	
Evaluator Rating	Reopen to Employee
Next Line Supervisor Review	Reopen to Evaluator or Employee
Evaluator Discussion and Acknowledgment Final	Reopen to Employee or Next Line Supervisor
Employee Acknowledgment Final	
	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 adjust.

For initial Evaluator Review steps that have been submitted to the employee for Self Review and edits need to be made, reach out to your agency 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 agency 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 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.

Step Status Report for Evaluators

Evaluators have access to the Standard Performance Review Step Status Report in MyPURPOSE. This report will help evaluators locate where a performance review is in workflow, as well as quickly see if their employee performance reviews are complete. Please see the report instructions below.

1. From the MyPURPOSE Home screen, hover over the Reports tab and select **Standard Reports**.

2. Select the **Performance** tab on the Reports screen, then select the Performance **Review Step Status Report**.
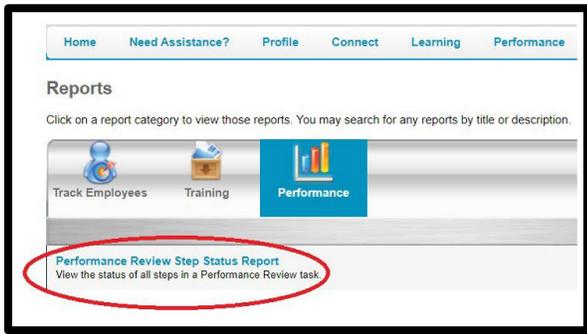
3. Enter Report Criteria:

   a. Using the dropdown option, select the User Criteria of **Organization**. You will be restricted to your organization and your direct reports.

   b. Select the options icon next to Performance Review Task.
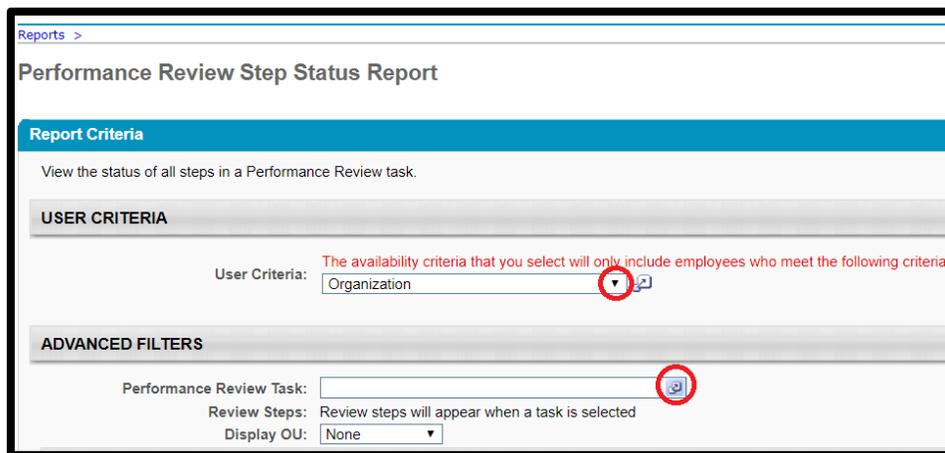
   c. From the Search Tasks screen, select the Performance Review you want to report on.
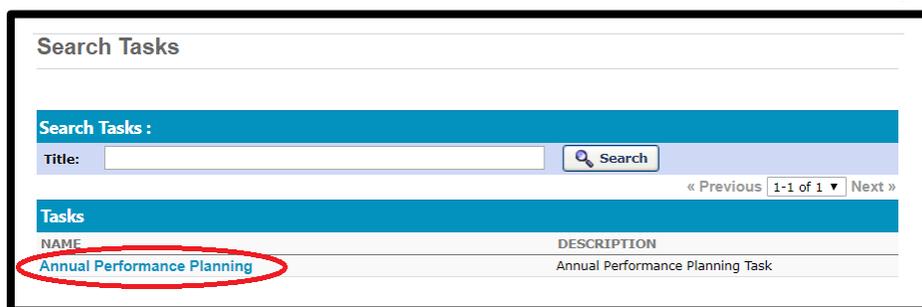
   d. All Review Steps should be checked by default.

e. Select, Export to Excel.
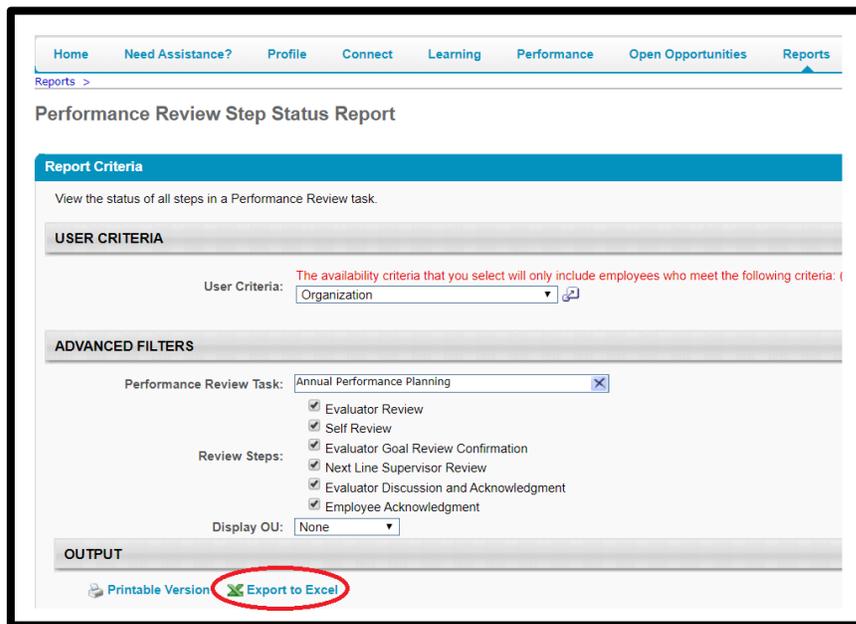
4. You will be prompted to Open or Save the Excel document, either option is fine. When the report displays, you will see a list of users (employees) who report to you.

Performance Review Step Status Report

| User	User ID	Manager	Title	Task Status	Evaluator Review	Self Review	Evaluator Goal Review Confirmation	Next Line Supervisor Review	Evaluator Discussion and Acknowledgment
Smith, Mary	XXX1234	Jones, Salley	Annual Performance Planning	Complete	Complete	Complete	Complete	Complete	Complete
Wright, Pixie	ABC0111	Jones, Salley	Annual Performance Planning	Complete	Complete	Complete	Complete	Complete	Complete
Moore, Tina	DEF4567	Jones, Salley	Annual Performance Planning	Complete	Complete	Complete	Complete	Complete	Complete
Jones, Salley	GHI8910	Johnson, Sue	Annual Performance Planning	Complete	Complete	Complete	Complete	Complete	Complete
Jackson, Joe	JKL2345	Jones, Salley	Annual Performance Planning	Complete	Complete	Complete	Complete	Complete	Complete
Taylor, Steve	MNO9874	Jones, Salley	Annual Performance Planning	Complete	Complete	Complete	Complete	Complete	Complete
Cox, Jessie	PQR0000	Jones, Salley	Annual Performance Planning	Complete	Complete	Complete	Complete	Complete	Complete

Report Criteria

Task:	Annual Performance Planning
Report Generated By:	Jones, Salley
Report Date:	3/18/2020

5. At a quick glance, you can see if a performance review task is fully completed by reviewing the Task Status Column. You will also see a column for each workflow step, if the Task Status column does not indicate that the task is complete, all other columns will show not started, in-progress, completed or past due. You will be able to add filters and sort your data by preference.