



Performance Management for ePerformance Supervisors

Job Aid

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In this module you will learn about performance management as a supervisor. This module will convey information about performance plans and IDP documents and the associated responsibilities of supervisors.

This module includes the following Sections and Topics:

Section 1: Establish a Performance Plan	<ul style="list-style-type: none"> Create a Performance Plan Submit a Performance Plan
Section 2: Complete Mid-Year Progress Review	<ul style="list-style-type: none"> Track Employee Progress Review Employee Self-Assessment Submit Mid-Year Progress Review
Section 3: Complete Evaluation	<ul style="list-style-type: none"> Track Employee Progress Nominate & Track Participant Reviews Review Employee Self-Assessment Submit Evaluation
Section 4: Second Level Supervisor Approval	<ul style="list-style-type: none"> Approve/Deny Rating

SECTION 1: ESTABLISH A PERFORMANCE PLAN

This section provides an overview of establishing a performance plan. Supervisors can create, update and sign performance plans in HR Links to track and evaluate an employee’s performance.

The following topics will be covered in this section:

Topic 1.1 – Create a Performance Plan

Topic 1.2 – Submit a Performance Plan

TOPIC 1.1: CREATE A PERFORMANCE PLAN

This topic will cover creating a performance plan. As a Supervisor, you can initiate, save, and submit employee performance plans. Your employees also have the capability to initiate and save their performance plans; however, only you can submit each plan to complete the document.

Supervisor functions can be found in the Team Performance component, where you can start a new performance document, or update/view in-progress performance documents.

- 1 To begin creating an employee performance plan, click the **Team Performance** tile on the *Manager Self Service* homepage.

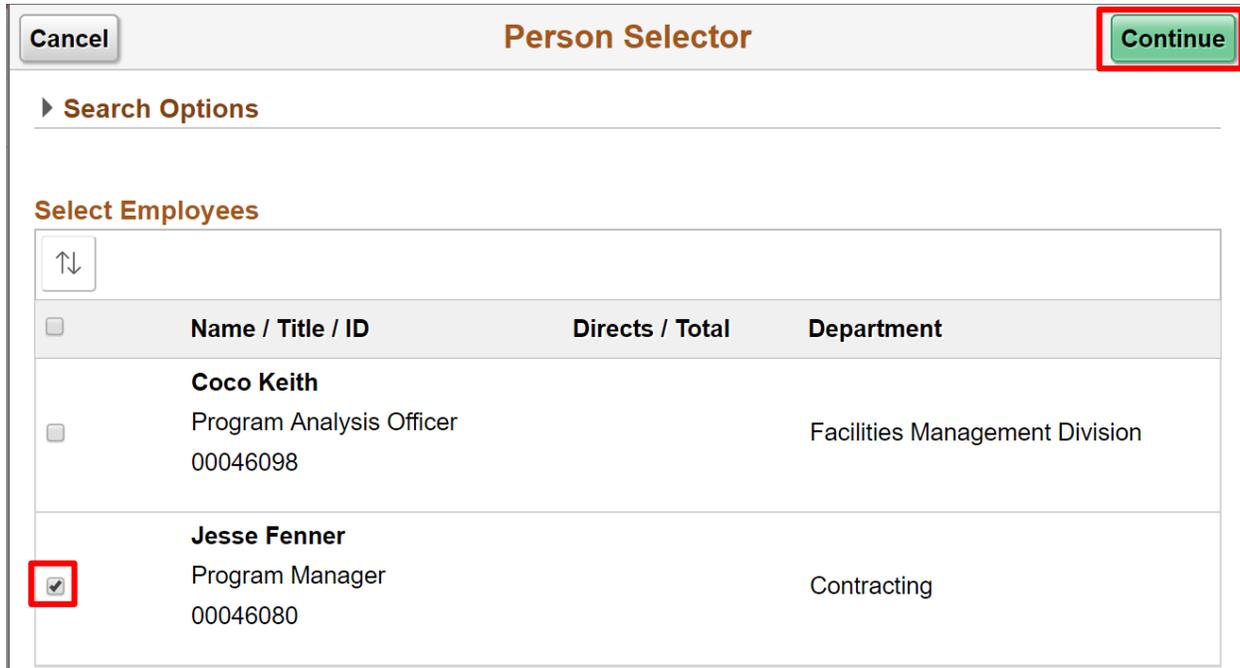


- 2 To start a performance plan, click **Create Document**.



Note: If your employee has already started his/her performance plan, it will be available on the *Current Documents* page.

- 3 On the *Person Selector* page, select the employee(s) for whom you want to create a performance plan.
- 4 Click **Continue**.



The screenshot shows the 'Person Selector' interface. At the top, there are 'Cancel' and 'Continue' buttons. Below is a 'Search Options' section. The main area is titled 'Select Employees' and contains a table with columns for 'Name / Title / ID', 'Directs / Total', and 'Department'. Two employees are listed: Coco Keith (Program Analysis Officer, ID 00046098, Facilities Management Division) and Jesse Fenner (Program Manager, ID 00046080, Contracting). The checkbox for Jesse Fenner is checked and highlighted with a red box.

<input type="checkbox"/>	Name / Title / ID	Directs / Total	Department
<input type="checkbox"/>	Coco Keith Program Analysis Officer 00046098		Facilities Management Division
<input checked="" type="checkbox"/>	Jesse Fenner Program Manager 00046080		Contracting

Note: If you select multiple employees on the *Person Selector* page, a performance document for each employee will be created using the same criteria.

- 5 Select the performance **Period Begin Date** and **Period End Date** by clicking the calendar icons.

Note: You may modify these dates after creating the performance document.

- 6 Select **Performance Document** from the *Document Type* drop-down menu.
- 7 Select **No** from the Clone from Prior Document slider switch.

Note: If you have prior year performance documents you would like to copy and edit, select Yes from the Clone from Prior Document slider switch and search for the document you wish to copy.

- 8 Select the applicable performance plan template from the Template drop-down menu (e.g., GSA employees select "**GSA Annual Performance Plan**").
- 9 Click **Create**.

Cancel **Create Document** **Create**

Period Begin Date 10/01/2017

Period End Date 09/30/2018

Document Type Performance Document

Clone from Prior Document No

Template GSA Annual Performance Plan

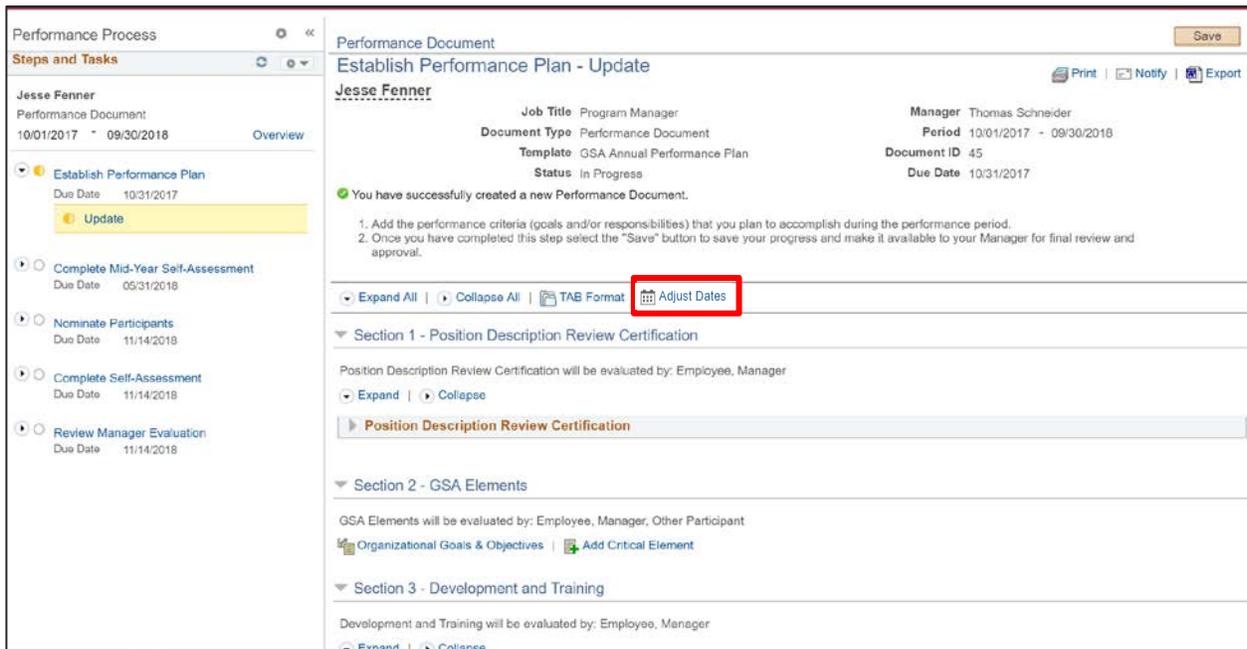
10 Click the newly created performance document to open.

Manager Self Service **Team Performance** **Create Documents**

Current Documents **Historical Documents**

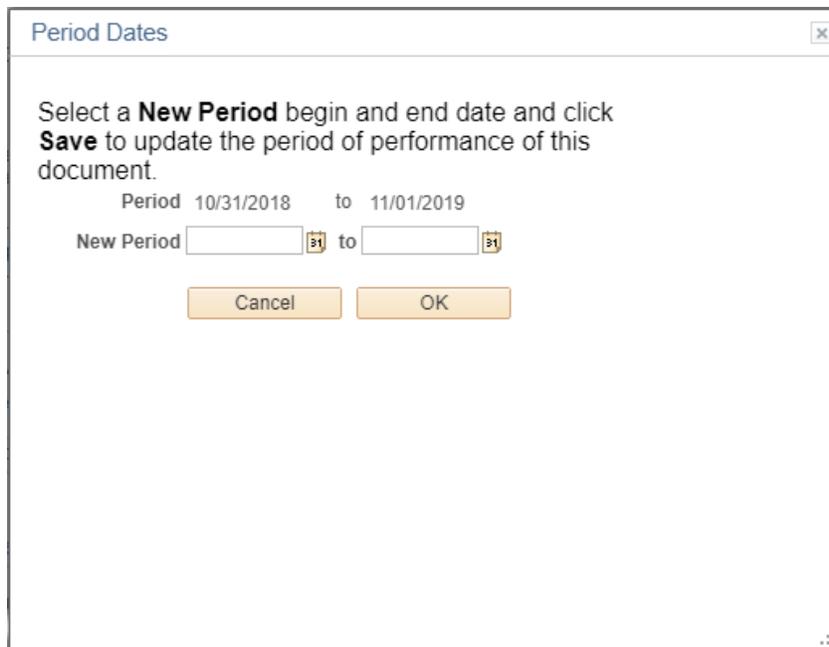
Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
Jesse Fenner Program Manager	46 Performance Document	Establish Performance Plan ■■■■	10/01/2017 09/30/2018	10/31/2017 >

11 If necessary, click **Adjust Dates** to adjust the period of performance.



12 Enter the new period of performance.

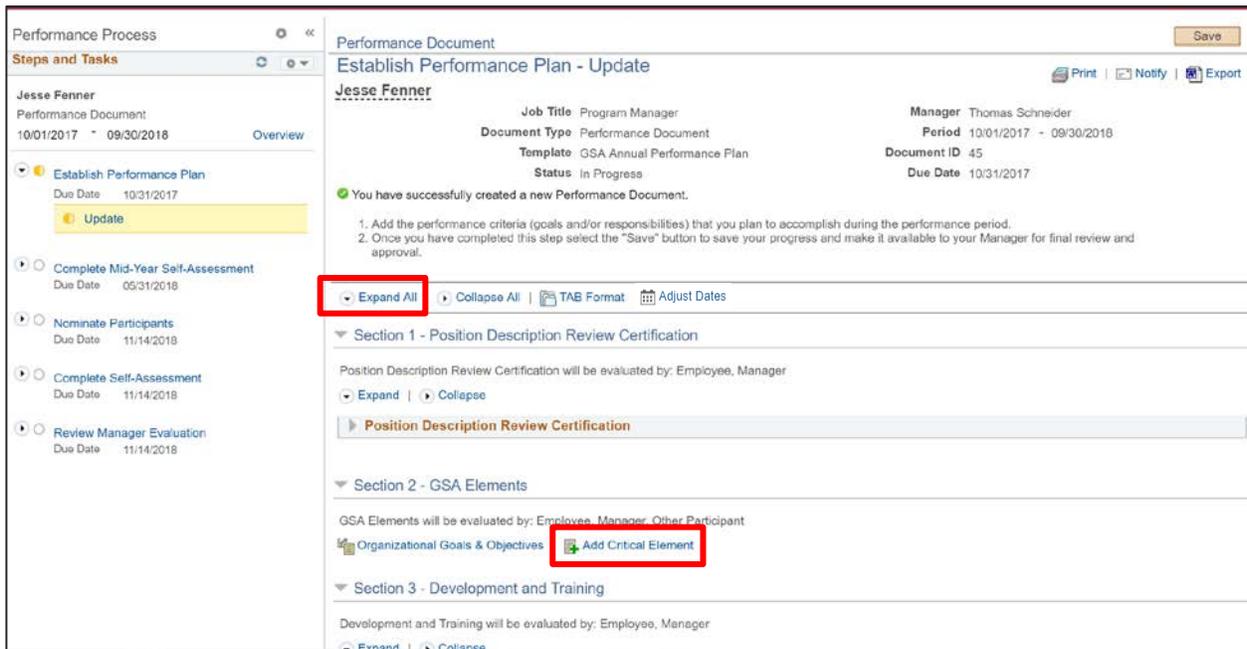
13 Click **OK**.



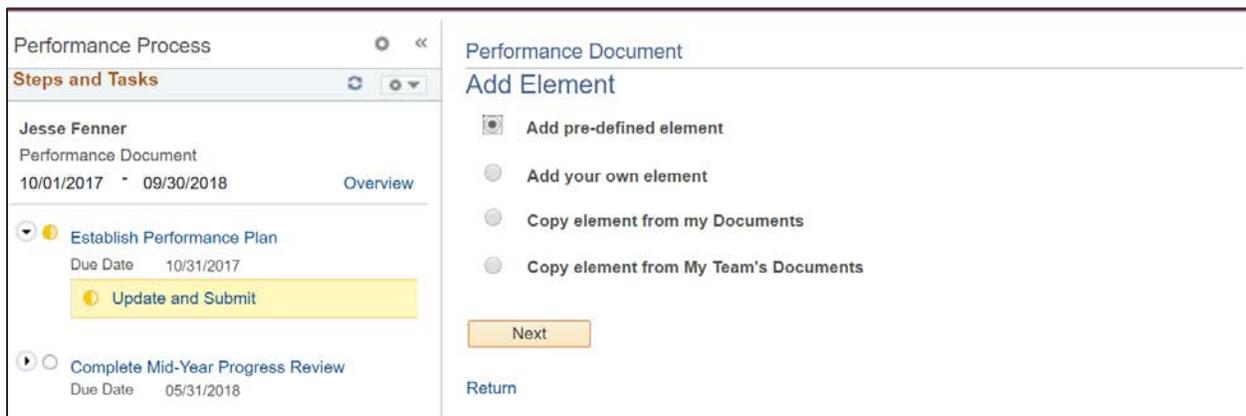
Note: Supervisors cannot submit an appraisal rating unless it has been at least 120 days since the document issue date. If you receive an error regarding the document issue date, contact your Servicing HR Office.

14 The blank performance plan loads. Click **Expand All** to expand all sections of the performance plan.

15 Click **Add Critical Element** to add content to the performance plan.



16 Select the applicable radio button on the **Add Element** page.



The options include:

- **Add pre-defined element:** Add element from the content library. For employees with supervisory responsibilities, use this option to add the required 40% leadership elements.
- **Add your own element:** Build a custom element from scratch.
- **Copy element from My Documents:** If you have completed performance documents available, you will be able to select elements from them using this option.
- **Copy element from My Team's Documents:** If you have completed performance documents for other members of your Team, you will be able to select elements from them using this option.

17 To add a sub-element to a critical element, click **Add Specific Measure**.

18 Select the applicable radio button on the Add a Specific Measure page:

Options include:

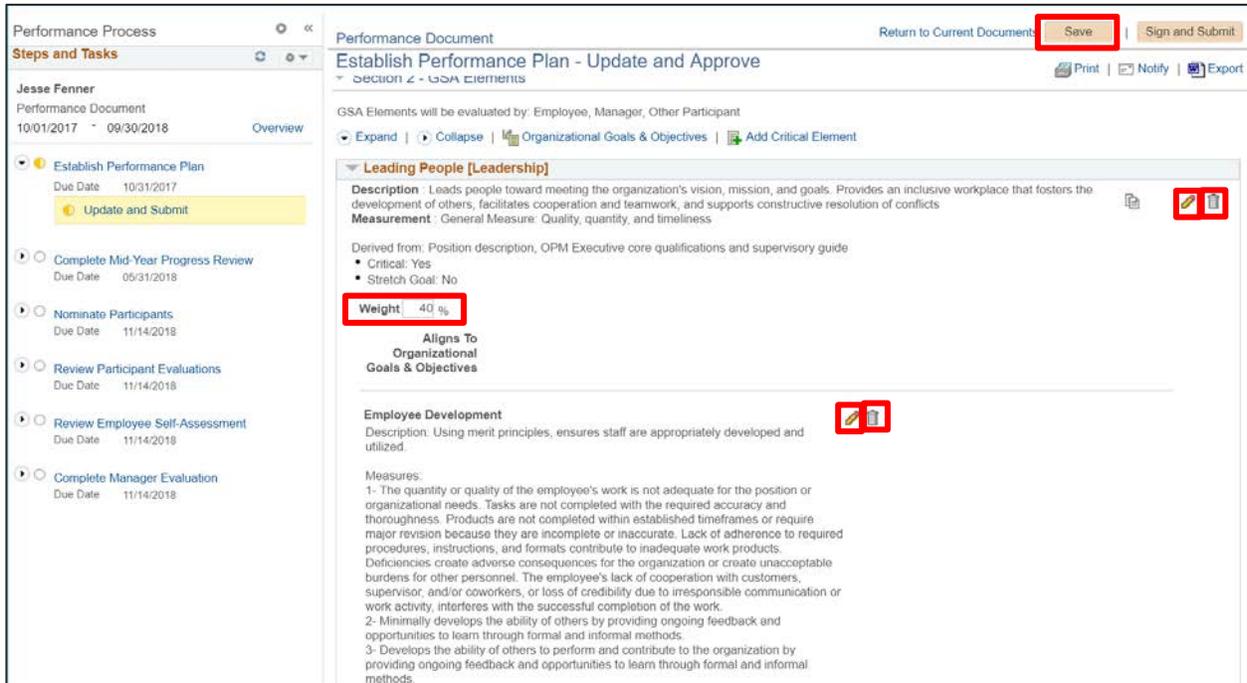
- **Add pre-defined specific measure:** Add element from the content library. This option is only available when a pre-defined element is selected.
- **Add your own specific measure:** Build a custom sub-element from scratch.

19 Add a weight for each element in the **Weight** field.

20 To edit an element or sub-element, click the **pencil** icon.

21 To delete an element or sub-element, click the **trash can** icon.

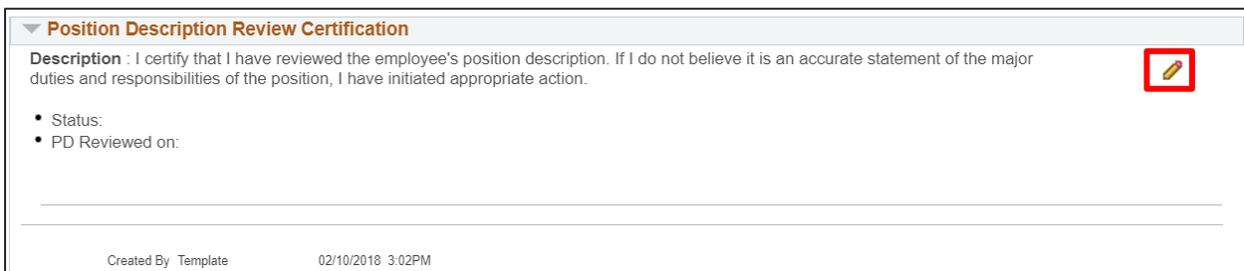
22 Click **Save** to save your work. You can return to HR Links at any time to continue working with a saved performance plan.



TOPIC 1.2: SUBMIT A PERFORMANCE PLAN

This topic will cover submitting a performance plan. Once you have submitted a performance plan, the document will automatically become available to the employee for review and acknowledgment.

- 1 After creating a performance document, click **Expand All** to expand all sections of this performance document.
- 2 Under the *Position Description Review Certification* section, click the pencil icon to edit.



- 3 From the **Status** drop-down menu, select the appropriate status.
- 4 Click the calendar button next to the **PD Reviewed on:** field and select the appropriate date to certify that you have reviewed the employee's position description.
- 5 Click **Update** to save your certification.

Performance Document
Edit Item

Title Position Description Review Certification

Description

I certify that I have reviewed the employee's position description. If I do not believe it is an accurate statement of the major duties and responsibilities of the position, I have initiated appropriate action.

Status Position Description has been review

PD Reviewed on: 10/10/2017

Update

Return

6 Click **Sign and Submit** to submit the document for employee acknowledgment.

Performance Process

Steps and Tasks

Jesse Fenner
Performance Document
10/01/2017 - 09/30/2018

- Establish Performance Plan
Due Date 10/31/2017
Update and Submit
- Complete Mid-Year Progress Review
Due Date 05/31/2018
- Nominate Participants
Due Date 11/14/2018
- Review Participant Evaluations
Due Date 11/14/2018
- Review Employee Self-Assessment
Due Date 11/14/2018
- Complete Manager Evaluation
Due Date 11/14/2018

Performance Document

Return to Current Documents Save Sign and Submit

Establish Performance Plan - Update and Approve

SECTION 2 - GSA Elements

GSA Elements will be evaluated by: Employee, Manager, Other Participant

Expand Collapse Organizational Goals & Objectives Add Critical Element

Leading People [Leadership]

Description: Leads people toward meeting the organization's vision, mission, and goals. Provides an inclusive workplace that fosters the development of others, facilitates cooperation and teamwork, and supports constructive resolution of conflicts

Measurement: General Measure: Quality, quantity, and timeliness

Derived from: Position description, OPM Executive core qualifications and supervisory guide

- Critical: Yes
- Stretch Goal: No

Weight 40%

Aligns To
Organizational
Goals & Objectives

Employee Development

Description: Using merit principles, ensures staff are appropriately developed and utilized.

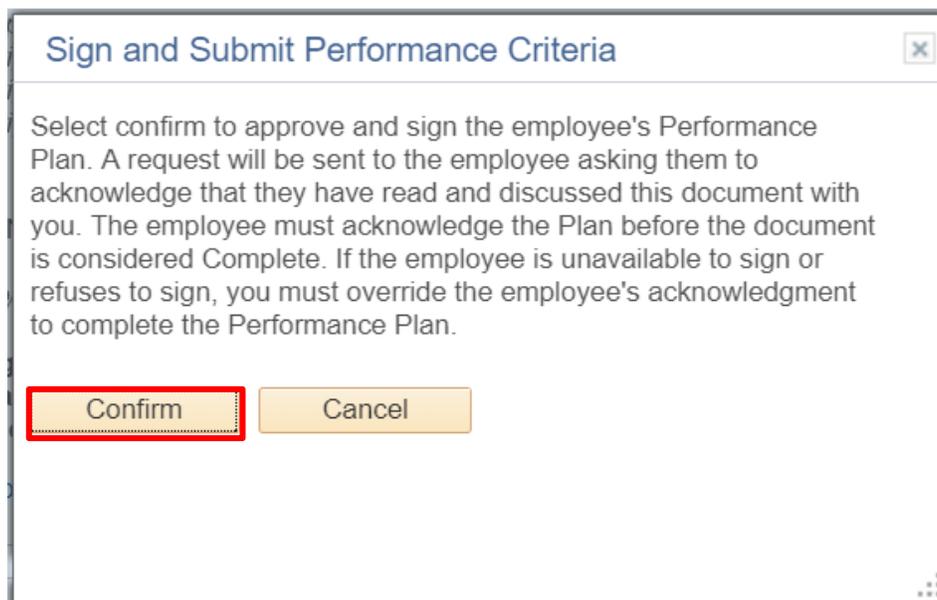
Measures:

- The quantity or quality of the employee's work is not adequate for the position or organizational needs. Tasks are not completed with the required accuracy and thoroughness. Products are not completed within established timeframes, or require major revision because they are incomplete or inaccurate. Lack of adherence to required procedures, instructions, and formats contribute to inadequate work products. Deficiencies create adverse consequences for the organization or create unacceptable burdens for other personnel. The employee's lack of cooperation with customers, supervisor, and/or coworkers, or loss of credibility due to irresponsible communication or work activity, interferes with the successful completion of the work.
- Minimally develops the ability of others by providing ongoing feedback and opportunities to learn through formal and informal methods.
- Develops the ability of others to perform and contribute to the organization by providing ongoing feedback and opportunities to learn through formal and informal methods.

Note: If the element weightings do not equal 100%, an error message will appear.

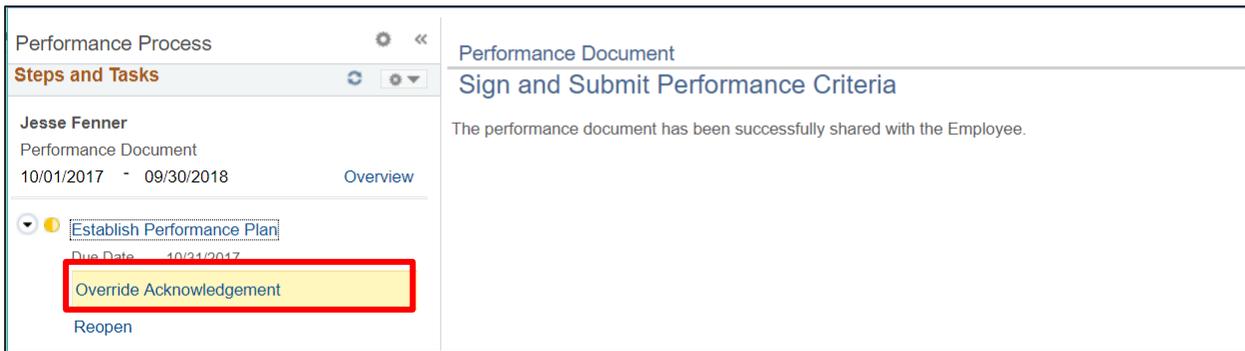
The screenshot shows the 'Performance Process' interface for 'Establish Performance Plan - Update and Approve' for employee Jesse Fenner. The document is in progress, and a problem is highlighted: 'Please adjust the GSA Elements section's item weighting by 60%, so that item weights add up to 100%.' The interface includes a 'Steps and Tasks' sidebar, document metadata, and a 'Position Description Review Certification' section.

- 7 Adjust the element weightings and click **Sign and Submit**.
- 8 Read the information provided in the confirmation box and click **Confirm**.

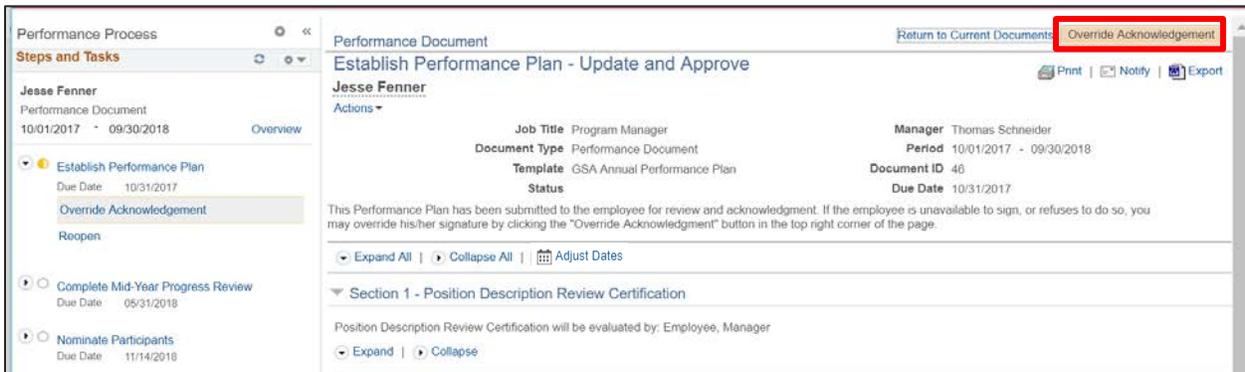


The performance plan has now been submitted to the employee for review and acknowledgment.

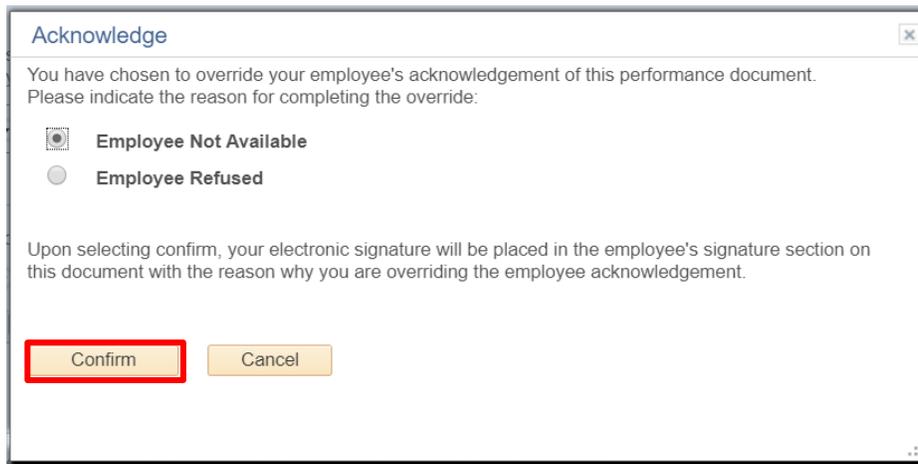
- 9 If the employee is unavailable to sign his/her performance plan, or refuses to do so, you are required to complete the performance plan using the *Override Acknowledgment* feature. To access *Override Acknowledgment*, click Establish Performance Plan from the left Steps and Tasks menu.
- 10 Click **Override Acknowledgment**.



11 Click **Override Acknowledgement** in the top right corner of the page.



12 Select the appropriate reason for completing the override and click **Confirm**.



The override has been completed.

SECTION 2: COMPLETE MID-YEAR PROGRESS REVIEW

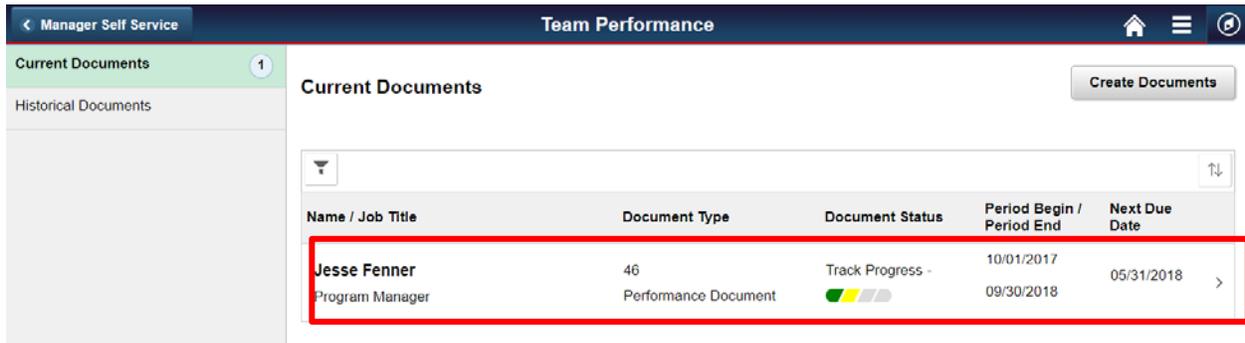
TOPIC 2.1: TRACK EMPLOYEE PROGRESS

This topic will cover tracking employee progress during the appraisal cycle. HR Links allows Supervisors to enter comments regarding employee progress immediately after the employee's performance plan has been completed.

Below is an example of the Team Performance Supervisor dashboard, which can be accessed from the *Manager Self-Service* fluid page, explained in Topic 1.1. In this example, the Supervisor has only initiated a

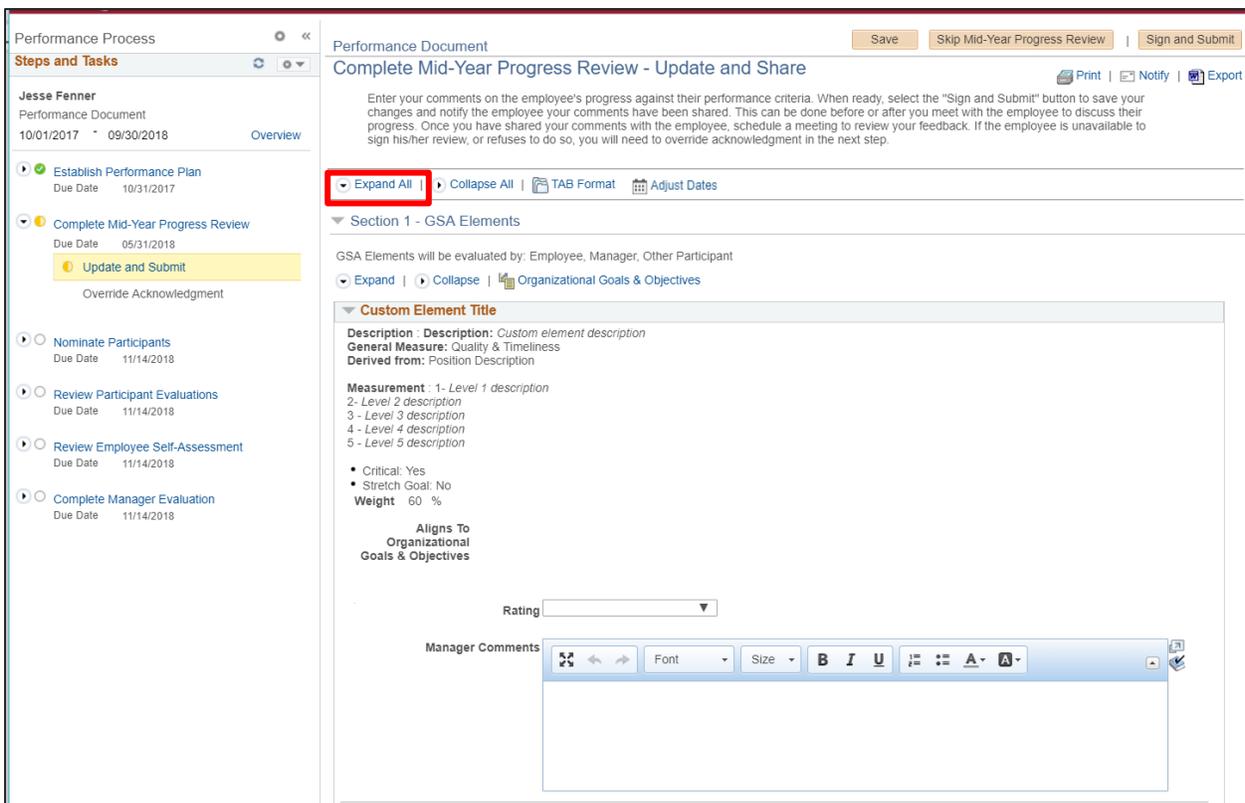
performance document for one employee. The document status is “Track Progress” and the status bar is *yellow*, indicating the employee has begun drafting or completed his/her mid-year self-assessment.

- 1 Click the performance document to begin tracking employee progress.



If the employee’s performance plan is completed, the *Complete Mid-Year Progress Review* page will automatically appear. If you are directed to the *Establish Performance Plan* page, the employee’s performance plan has not been completed. Return to Topic 1 to complete the plan.

- 2 Click **Expand All** and to expand all sections of the performance document.



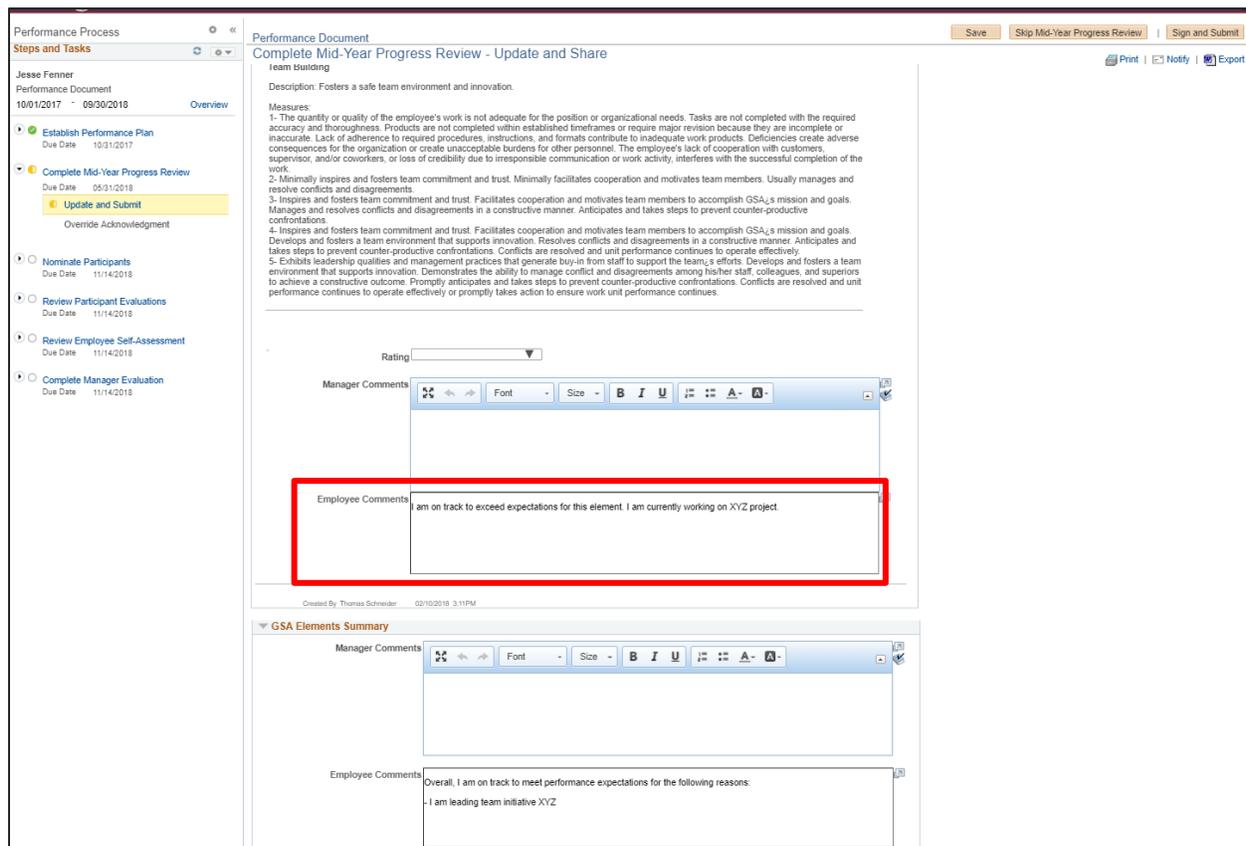
- 3 If the employee has submitted his/her self-assessment, you will see an additional box for Employee Comments. Enter progress notes in each of the *Manager Comments* text boxes, as appropriate.
- 4 Click **Save** to save and return to this progress review at a later time.

TOPIC 2.2: REVIEW EMPLOYEE SELF-ASSESSMENT

This topic will explain reviewing employee self-assessments as a part of the employee’s Mid-Year Progress Review. HR Links offers employees the opportunity to submit a self-assessment to their supervisor during the mid-year and final evaluation process.

As mentioned in Topic 2.1, if your employee has submitted his/her self-assessment for the Mid-Year Progress Review, an additional box for *Employee Comments* will be included on the Mid-Year Progress Review.

- 1 Review the Employee Comments.



- 2 If you do not see the *Employee Comments* text box, remind your employee(s) to submit his/her self-assessment. Once you have submitted the Mid-Year Progress Review, the employee will no longer be able to submit his/her self-assessment.

TOPIC 2.3: SUBMIT MID-YEAR PROGRESS REVIEW

In this topic we will discuss the process of finalizing and submitting an employee's Mid-Year Progress Review. In Topics 2.1 and 2.2 we began tracking the employee's progress and reviewed the employee's self-assessment.

- 1 After returning to the employee's performance document, click **Expand All** to access the *Manager Comments* fields for each element and section.
- 2 Enter and finalize your comments, and select a rating for each element, if required by GSA policy.

Performance Process

Performance Document

Complete Mid-Year Progress Review - Update and Share

Save Skip Mid-Year Progress Review Sign and Submit

Print | Notify | Export

Steps and Tasks

Jesse Fenner

Performance Document

10/01/2017 - 09/30/2018 Overview

- Establish Performance Plan Due Date: 10/31/2017
- Complete Mid-Year Progress Review Due Date: 05/31/2018
 - Update and Submit
 - Override Acknowledgment
- Nominate Participants Due Date: 11/14/2018
- Review Participant Evaluations Due Date: 11/14/2018
- Review Employee Self-Assessment Due Date: 11/14/2018
- Complete Manager Evaluation Due Date: 11/14/2018

Description: Fosters a safe team environment and innovation.

Measures:

- 1- The quantity or quality of the employee's work is not adequate for the position or organizational needs. Tasks are not completed with the required accuracy and thoroughness. Products are not completed within established timeframes or require major revision because they are incomplete or inaccurate. Lack of adherence to required procedures, instructions, and formats contribute to inadequate work products. Deficiencies create adverse consequences for the organization or create unacceptable burdens for other personnel. The employee's lack of cooperation with customers, supervisor, and/or coworkers, or loss of credibility due to irresponsible communication or work activity, interferes with the successful completion of the work.
- 2- Minimally inspires and fosters team commitment and trust. Minimally facilitates cooperation and motivates team members. Usually manages and resolve conflicts and disagreements.
- 3- Inspires and fosters team commitment and trust. Facilitates cooperation and motivates team members to accomplish GSA's mission and goals. Manages and resolves conflicts and disagreements in a constructive manner. Anticipates and takes steps to prevent counter-productive confrontations.
- 4- Inspires and fosters team commitment and trust. Facilitates cooperation and motivates team members to accomplish GSA's mission and goals. Develops and fosters a team environment that supports innovation. Resolves conflicts and disagreements in a constructive manner. Anticipates and takes steps to prevent counter-productive confrontations. Conflicts are resolved and unit performance continues to operate effectively.
- 5- Exhibits leadership qualities and management practices that generate buy-in from staff to support the team's efforts. Develops and fosters a team environment that supports innovation. Demonstrates the ability to manage conflict and disagreements among his/her staff, colleagues, and superiors to achieve a constructive outcome. Promptly anticipates and takes steps to prevent counter-productive confrontations. Conflicts are resolved and unit performance continues to operate effectively or promptly takes action to ensure work unit performance continues.

Rating: Level 4 Above Fully Succ.

Manager Comments

Jesse demonstrates his ability to lead people through his participation in the XYZ project. He has volunteered to mentor Mrs. Jane Smith and continues to serve as a leader on the Team.

Employee Comments

I am on track to exceed expectations for this element. I am currently working on XYZ project.

Created By: Thomas Schneider 02/10/2018 3:11PM

GSA Elements Summary

Manager Comments

Overall, Jesse is a tremendous asset to our Team.

Employee Comments

Overall, I am on track to meet performance expectations for the following reasons:
- I am leading team initiative XYZ

- 3 In Section 2 – Development and Training, enter comments to indicate professional growth needs and venues to meet those needs, if applicable.

Section 2 - Development and Training

Development and Training will be evaluated by: Employee, Manager

Expand | Collapse | Add Item

Development and Training

Description: Indicate professional growth needs and venues to meet those needs.

Manager Comments

Jesse has indicated an interest in becoming a subject matter expert for our new HR system. We are identifying training opportunities and plan to fund Jesse's training for April/May

Employee Comments

Created By: Template 02/10/2018 3:02PM

- 4 If you wish to add supporting attachments, upload them in the *Attachments* section.

Attachments				
Customer_Appreciation_Letter_Fenner.docx	Description	Attachment Audience	Last Update Date/Time	Uploaded By
Customer_Appreciation_Letter_Fenner.docx	Letter from Customer	Employee and Manager	02/11/2018 10:47:13AM	Thomas Schneider
<input type="button" value="Add Attachment"/>				

- 5 When you have finalized the Mid-Year Progress Review and are ready to submit, click **Sign and Submit**.

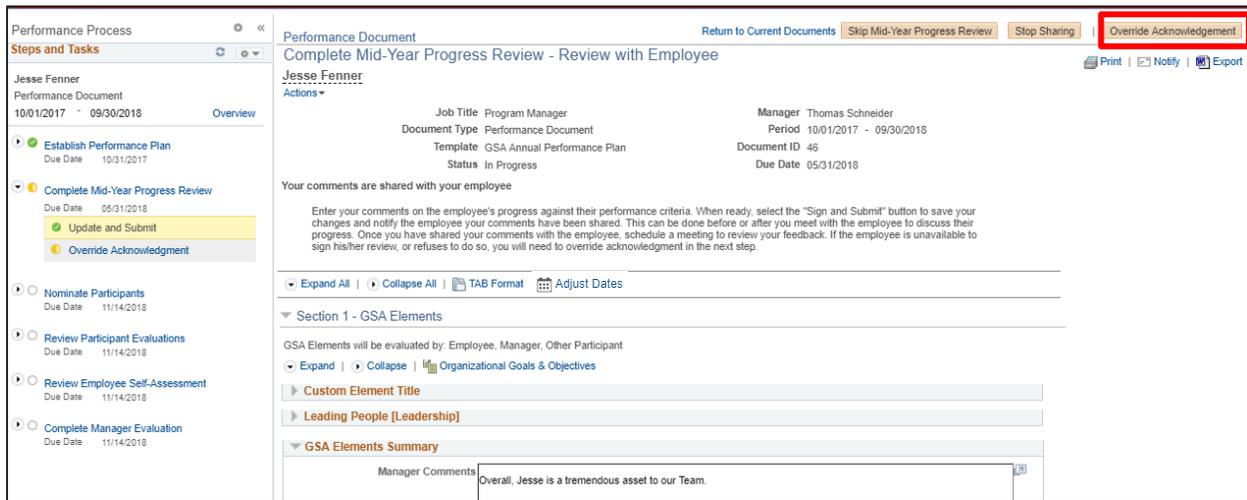
The screenshot shows the 'Performance Document' interface for 'Complete Mid-Year Progress Review - Update and Share'. The 'Sign and Submit' button is highlighted in red. The interface includes a 'Steps and Tasks' sidebar on the left, a main content area with a 'Manager Comments' text box containing 'Overall, Jesse is a tremendous asset to our Team.', and an 'Employee Comments' text box containing 'Overall, I am on track to meet performance expectations for the following reasons: - I am leading team initiative XYZ'. The 'Attachments' table at the bottom shows a file named 'Customer_Appreciation_Letter_Fenner.docx'.

Attachment	Description	Attachment Audience	Last Update Date/Time	Uploaded By
Customer_Appreciation_Letter_Fenner.docx	Customer Appreciation Letter	Employee and Manager	02/11/2018 10:51:42AM	Thomas Schneider

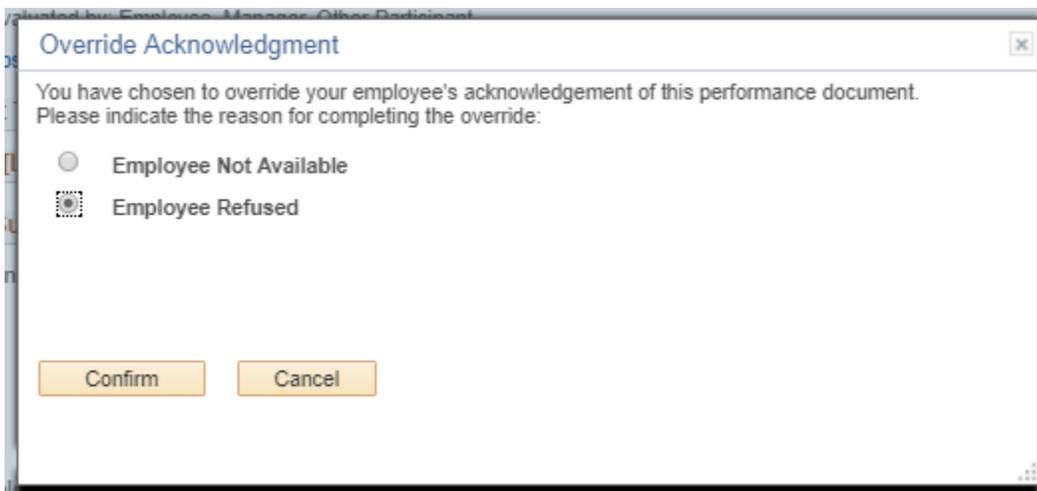
- 6 Click **Confirm**.

The dialog box titled 'Sign and Submit Mid-Year Progress Review' contains the following text: 'Select confirm to sign and submit this Mid-Year Progress Review. A request will be sent to the employee asking them to acknowledge that he/she has reviewed the evaluation. The employee must acknowledge the Mid-Year Progress Review before it is considered complete.' The 'Confirm' button is highlighted in red.

- 7 If the employee is unavailable to sign his/her Mid-Year Progress Review, or refuses to do so, you are required to complete the review using the *Override Acknowledgment* feature. To access *Override Acknowledgment*, click Complete Mid-Year Progress Review from the left Steps and Tasks menu.
- 8 Click **Override Acknowledgment**.



- 9 Select the appropriate reason for completing the override and click **Confirm** to complete the override.



- 10 If you are required to skip the Mid-Year Progress Review, click **Skip Mid-Year Progress Review**.

Performance Process

Steps and Tasks

Jesse Fenner
Performance Document
10/01/2017 - 09/30/2018

Establish Performance Plan
Due Date: 10/31/2017

Complete Mid-Year Progress Review
Due Date: 05/31/2018
Update and Submit
Override Acknowledgment

Nominate Participants
Due Date: 11/14/2018

Review Participant Evaluations
Due Date: 11/14/2018

Review Employee Self-Assessment
Due Date: 11/14/2018

Complete Manager Evaluation
Due Date: 11/14/2018

Performance Document
Complete Mid-Year Progress Review - Update and Share

Save **Skip Mid-Year Progress Review** Sign and Submit

Print | Notify | Export

Jesse Fenner
Actions

Job Title: Program Manager
Document Type: Performance Document
Template: GSA Annual Performance Plan
Status: In Progress

Manager: Thomas Schneider
Period: 10/01/2017 - 09/30/2018
Document ID: 46
Due Date: 05/31/2018

Your comments are currently not shared with your employee

Enter your comments on the employee's progress against their performance criteria. When ready, select the "Sign and Submit" button to save your changes and notify the employee your comments have been shared. This can be done before or after you meet with the employee to discuss their progress. Once you have shared your comments with the employee, schedule a meeting to review your feedback. If the employee is unavailable to sign his/her review, or refuses to do so, you will need to override acknowledgment in the next step.

Expand All | Collapse All | TAB Format

Section 1 - GSA Elements

GSA Elements will be evaluated by: Employee, Manager, Other Participant

Expand | Collapse | Organizational Goals & Objectives

Custom Element Title

Leading People [Leadership]

GSA Elements Summary

Manager Comments

Overall, Jesse is a tremendous asset to our Team.

Employee Comments

Overall, I am on track to meet performance expectations for the following reasons:
- I am leading team initiative XYZ

Section 2 - Development and Training

Development and Training will be evaluated by: Employee, Manager

Expand | Collapse | Add Item

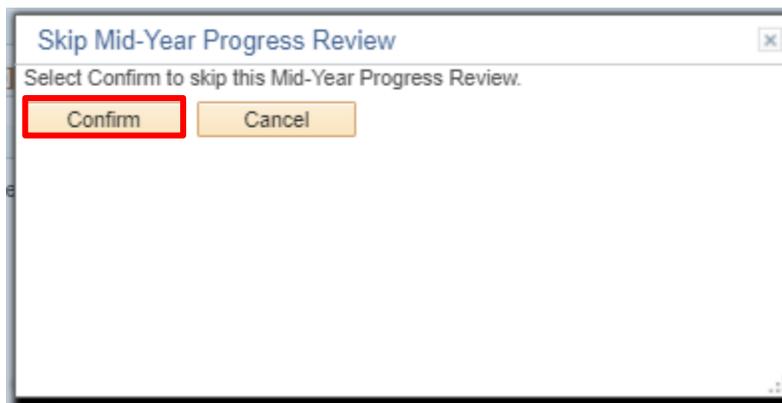
Development and Training

Attachments

Customer_Appreciation_Letter_Fenner.docx	Description	Attachment Audience	Last Update DateTime	Uploaded By
Customer_Appreciation_Letter_Fenner.docx	Customer Appreciation Letter	Employee and Manager	02/11/2016 10:51:42AM	Thomas Schneider

Add Attachment

11 Click Confirm.



SECTION 3: COMPLETE EVALUATION

TOPIC 3.1: TRACK EMPLOYEE PROGRESS

This topic covers tracking employee progress in support of an employee's evaluation. After you have completed (or skipped) a Mid-Year Progress Review for an employee, you can begin tracking employee progress.

- 1 Return to the employee's performance document by navigating to the Manager Self-Service fluid page, clicking the Team Performance tile and clicking the employee's performance document.

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
Jesse Fenner Program Manager	46 Performance Document	Evaluation in Progress	10/01/2017 09/30/2018	11/14/2018

- 2 If the employee's Mid-Year Progress Review has been completed, you will automatically be directed to the employee's evaluation. If you are not successfully navigated to the evaluation, return to Topic 2 to complete the employee's Mid-Year Progress Review.
- 3 Click **Expand All** to access all Manager Comments text boxes.

Performance Document
Manager Evaluation - Update and Submit

Jesse Fenner

Job Title: Program Manager
Document Type: Performance Document
Template: GSA Annual Performance Plan
Status: Evaluation in Progress

Manager: Thomas Schneider
Period: 10/01/2017 - 09/30/2018
Document ID: 45
Due Date: 11/14/2018

Employee Data

Empl ID: 00046080
Department: 10PRAA
Location: 0000000001
Position: 00016506
Job Code: 100975
Occ Series: 0340
Bargaining Unit: 8888
Pay Plan: GM
Plan/Grade: 0000 15
Step: 0
Years of Service: 1 Years 1 Months
Years in Job: 1 Years 1 Months

Rating History

Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.

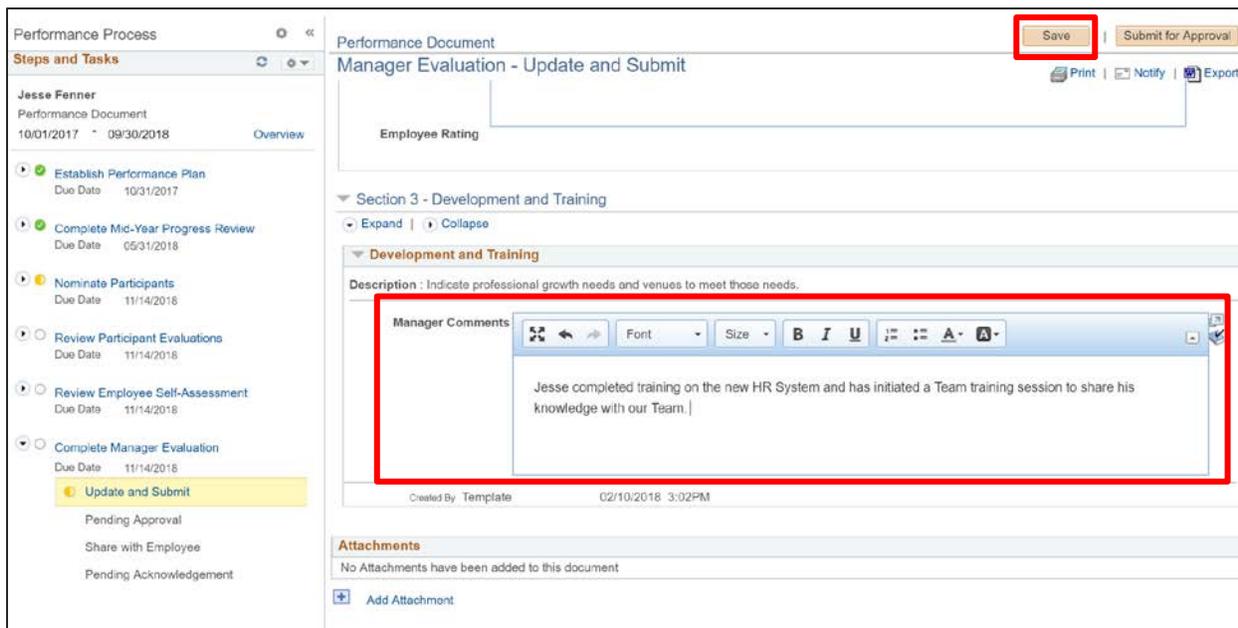
Expand All | Collapse All | TAB Format | Calculate All Ratings | Cancel Evaluation

Section 1 - Position Description Review Certification

Position Description Review Certification

Section 2 - GSA Elements

- 4 Track employee progress using the **Manager Comments** text fields for each element, the *GSA Elements Summary* section and the *Development and Training* section.
- 5 Click **Save** to save your comments and return to the evaluation at a later time.



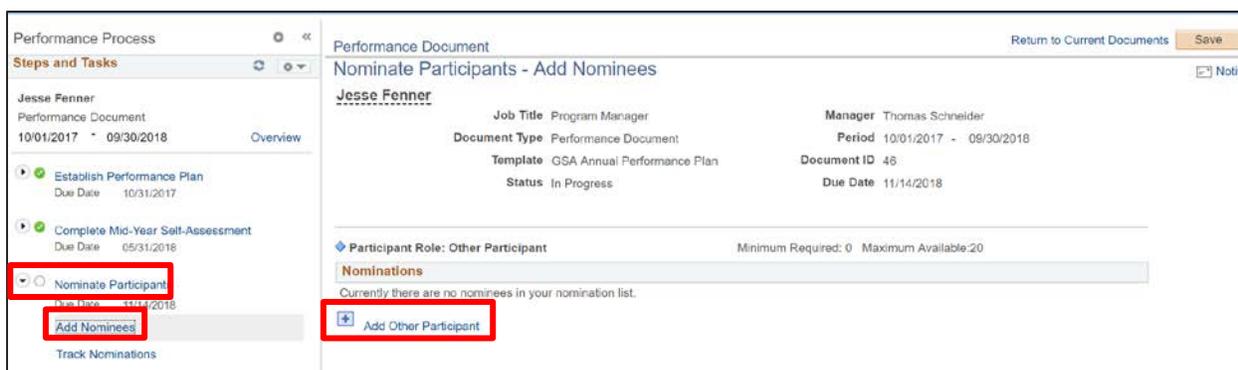
You can enter and save comments as often as you would like before finalizing and submitting the evaluation.

TOPIC 3.2: NOMINATE AND TRACK PARTICIPANT REVIEWS

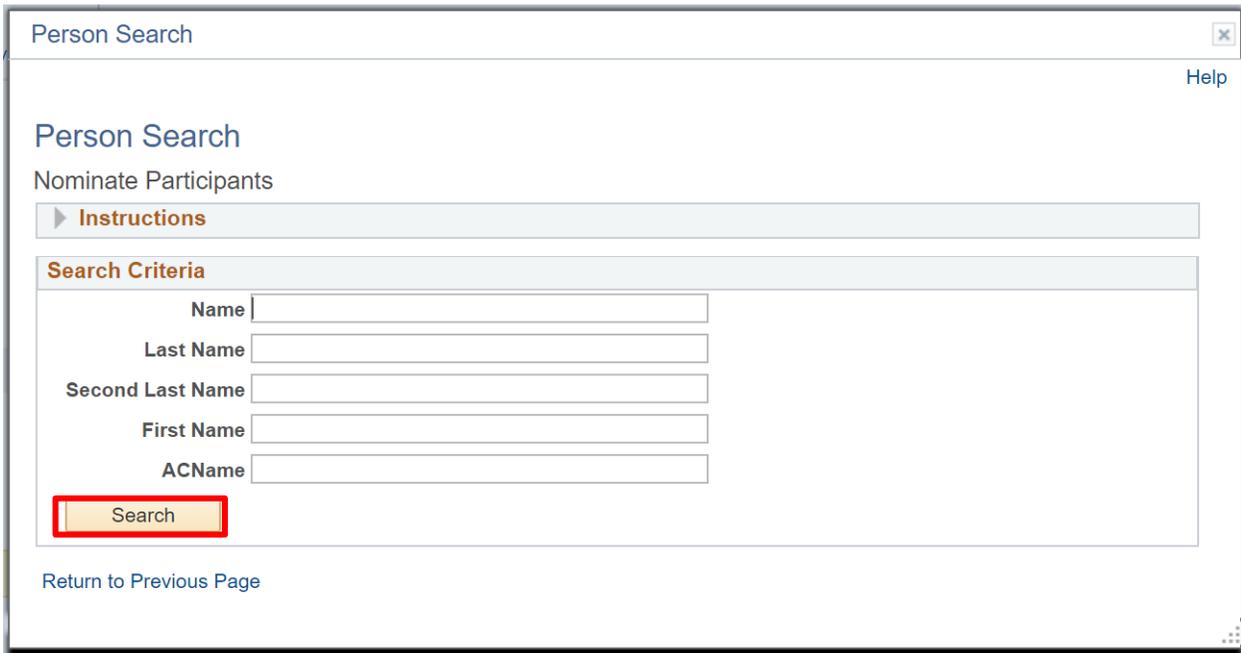
This topic covers nominating participant reviewers in HR Links. The system allows both employees and Supervisors to nominate and track participant reviews. However, only Supervisors can submit nominations. Once nominated, participant reviewers receive a notification alerting them of the evaluation request.

- 1 To nominate participant reviewers, return to your performance document and click **Nominate Participants**.
- 2 Click **Add Nominees**.
- 3 To begin adding participant reviewers, click **Add Other Participant**.

Note: If the employee has added a nominee, you will see them in the Nominations section on this page.

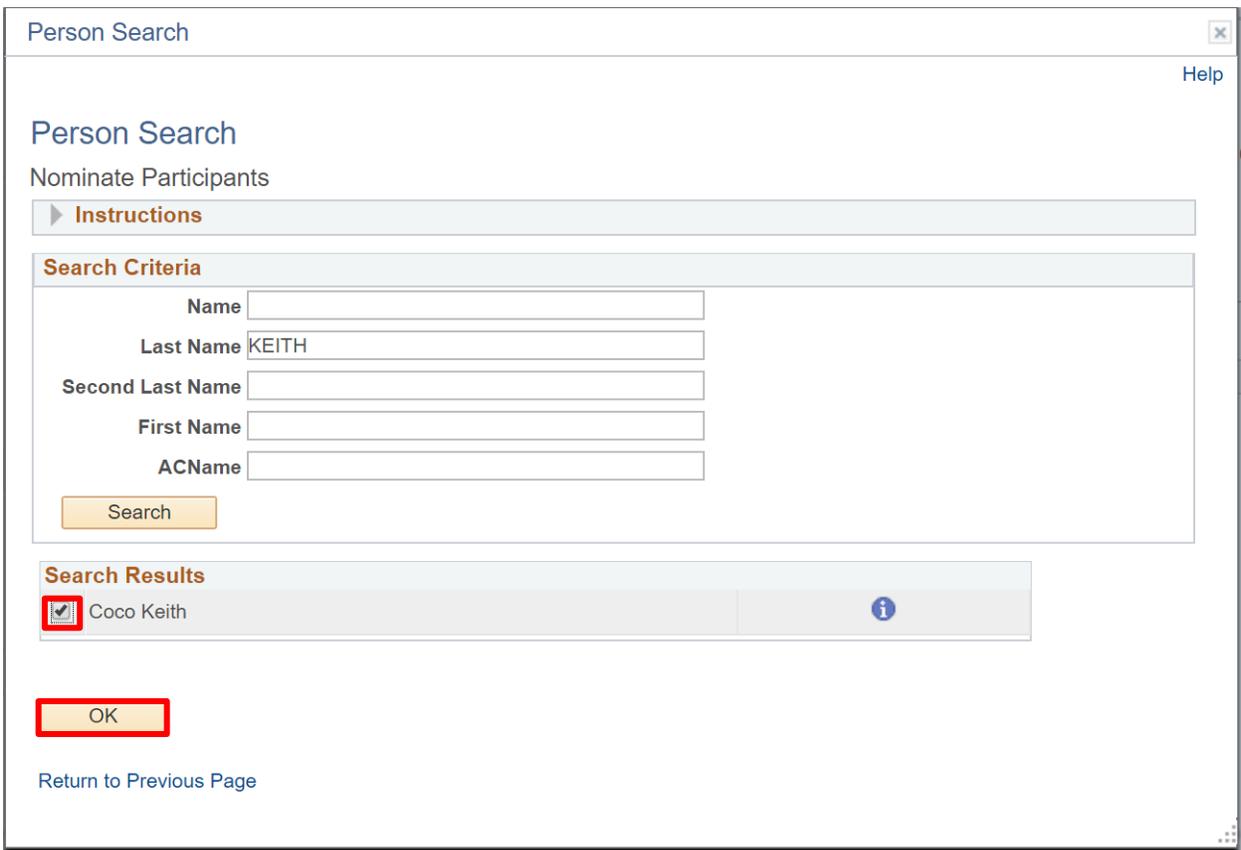


- 4 On the *Person Search* page, enter the applicable search criteria to search for the correct participant reviewer.
- 5 Click **Search**.



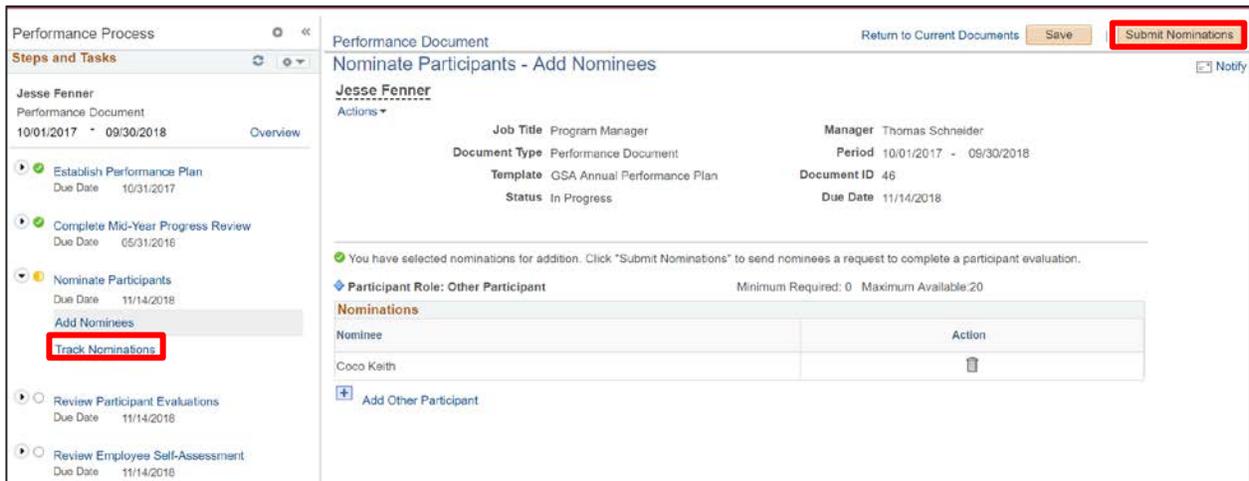
The screenshot shows a web browser window titled "Person Search". The page content includes a "Person Search" heading, a "Nominate Participants" sub-heading, and an "Instructions" section. Below this is a "Search Criteria" section with five input fields: "Name", "Last Name", "Second Last Name", "First Name", and "ACName". The "Search" button is highlighted with a red rectangle. At the bottom, there is a "Return to Previous Page" link.

- 6 Select the checkbox next to the employee name and click **OK**.

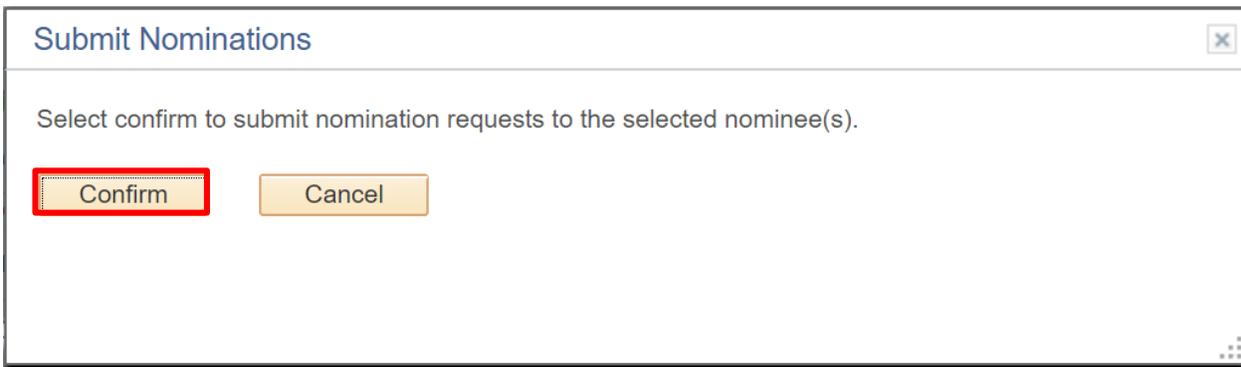


The screenshot shows the same "Person Search" form, but now with search results. The "Last Name" field contains the text "KEITH". Below the search criteria is a "Search Results" section with a table containing one entry: "Coco Keith" with a checked checkbox and an information icon. The "OK" button is highlighted with a red rectangle. The "Return to Previous Page" link is still present at the bottom.

- 7 Click **Submit Nominations**. Throughout the evaluation process, you can view the status of your nominations by clicking the **Track Nominations** link under *Nominate Participants* from the Steps and Tasks menu.



- 8 Click **Confirm** to submit nominations.



TOPIC 3.3: REOPEN PARTICIPANT REVIEW

This topic covers reopening completed participant or peer reviews.

Note: Participant reviews can only be reopened when the document status is Evaluation in Progress.

- 1 Navigate to the employee's performance document by returning to the Manager Self-Service fluid page.
- 2 Click the **Team Performance** tile.
- 3 Click the employee's performance document.

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
Jason Smith Interdisciplinary	Performance Document	Establish Performance Plan 	10/31/2018 11/01/2019	11/14/2019
Daniel Elizondo Mechanical Engineer	Performance Document	Approval - Approved 	10/01/2018 10/30/2019	11/16/2020
Jeffrey McGowan Lead Architect	Performance Document	Evaluation in Progress 	10/01/2018 09/30/2019	11/14/2019
Jason Smith Interdisciplinary	Performance Document	Evaluation in Progress 	10/01/2018 09/30/2019	11/14/2019
David Phillips Architect	Performance Document	Establish Performance Plan 	10/01/2018 09/30/2019	11/14/2018

- 4 Click **Review Participant Evaluations** in the left sidebar.
- 5 Click **View**.

Review Participant Evaluations
Due Date 11/14/2019
 View

- 6 Click the name of the Participant whose review you wish to reopen.

Participant Evaluation

Participant	Role	Status	Due Date
Michelle Lee	Other Participant	Completed	11/14/2019

Return

- 7 Click **Reopen**.

Job Title	Interdisciplinary	Manager	Jeffrey Maciejewski
Document Type	Performance Document	Period	10/01/2018 - 09/30/2019
Template	GSA Annual Performance Plan	Document ID	33847
Status	Completed	Due Date	11/14/2019
Reviewer	Michelle Lee	Role	Other Participant

▼ Group box 15

Rating History

The document status is Completed.

Expand All | Collapse All | TAB Format | **Reopen**

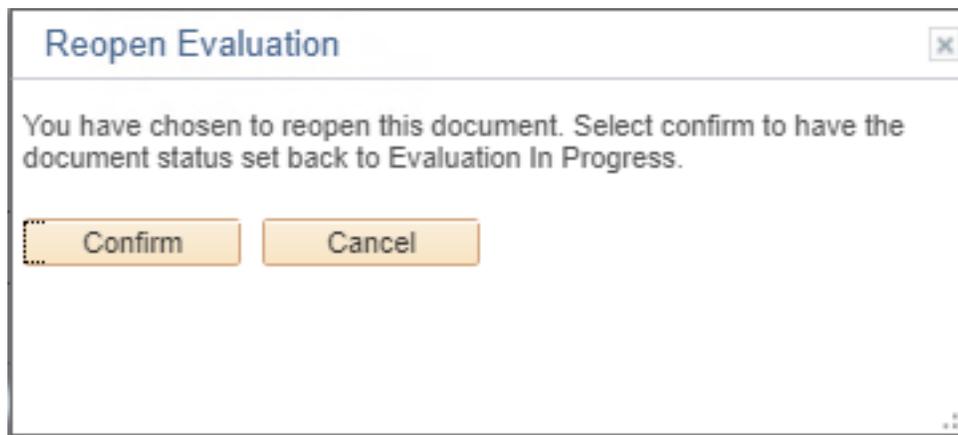
▼ Section 1 - GSA Elements

Expand | Collapse | Organizational Goals & Objectives

▶ Operational Excellence (Technical)

▶ Customer Relationship

8 Click **Confirm** to reopen the evaluation.



TOPIC 3.4: REVIEW EMPLOYEE SELF-ASSESSMENT AND PARTICIPANT EVALUATIONS

This topic will explain reviewing employee self-assessments as a part of the employee's evaluation. HR Links offers employees the opportunity to submit a self-assessment to their supervisor during the mid-year and final evaluation process.

- 9 Navigate to the employee's performance document by returning to the Manager Self-Service fluid page.
- 10 Click the **Team Performance** tile.
- 11 Click the employee's performance document.

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
Jesse Fenner Program Manager	46 Performance Document	Evaluation in Progress 	10/01/2017 09/30/2018	11/14/2018

12 If the employee has completed his/her self-assessment, the circle next to *Review Employee Self-Assessment* will be green. Click the link to expand the *Review Employee Self-Assessment* section.

13 Click **View** to view the employee’s self-assessment.

Note: The employee’s completed self-assessment will open in a new tab or window. Make sure that any pop-up blocker is disabled.

14 Review and/or print the employee’s self-assessment in preparation for completing the employee’s evaluation.

Performance Document
Self-Evaluation - Completed

Jesse Fenner

Print | Notify | Export

Actions ▾

Job Title Program Manager Manager Thomas Schneider
 Document Type Performance Document Period 10/01/2017 - 09/30/2018
 Template GSA Annual Performance Plan Document ID 46
 Status Completed Due Date 11/14/2018

Employee Data

Empl ID 00046080
 Department 10PRAA Contracting
 Location 000000001 ANCHORAGE FED BUILD
 Position 00016506 Job Code 100975 Occ Series 0340 Bargaining Unit 8888
 Pay Plan GM Plan/Grade 0000 15 Step 0
 Years of Service 1 Years 1 Months
 Years in Job 1 Years 1 Months

Rating History

The document status is Completed.

Expand All | Collapse All | TAB Format | Reopen

Section 1 - Position Description Review Certification

Expand | Collapse

Position Description Review Certification

Section 2 - GSA Elements

Expand | Collapse | Organizational Goals & Objectives

Custom Element Title

Leading People

GSA Elements Summary

Employee Rating Level 4 Above Fully Successful 04.00

15 To review completed Participant Evaluations, click *Review Participant Evaluations* from the left *Steps and Tasks* menu.

16 Click **View**.

Performance Process

Steps and Tasks

Jesse Fenner
Performance Document
10/01/2017 - 09/30/2018 Overview

- Establish Performance Plan
Due Date 10/31/2017
- Complete Mid-Year Progress Review
Due Date 05/31/2018
- Nominate Participants
Due Date 11/14/2018
- Review Participant Evaluations**
Due Date 11/14/2018
View
- Review Employee Self-Assessment
Due Date 11/14/2018
View

Performance Document

Manager Evaluation - Update and Submit

Jesse Fenner

Print | Notify | Export

Actions ▾

Job Title Program Manager Manager Thomas Schneider
 Document Type Performance Document Period 10/01/2017 - 09/30/2018
 Template GSA Annual Performance Plan Document ID 46
 Status Evaluation in Progress Due Date 11/14/2018

Employee Data

Empl ID 00046080
 Department 10PRAA Contracting
 Location 000000001 ANCHORAGE FED BUILD
 Position 00016506 Job Code 100975 Occ Series 0340 Bargaining Unit 8888
 Pay Plan GM Plan/Grade 0000 15 Step 0
 Years of Service 1 Years 1 Months
 Years in Job 1 Years 1 Months

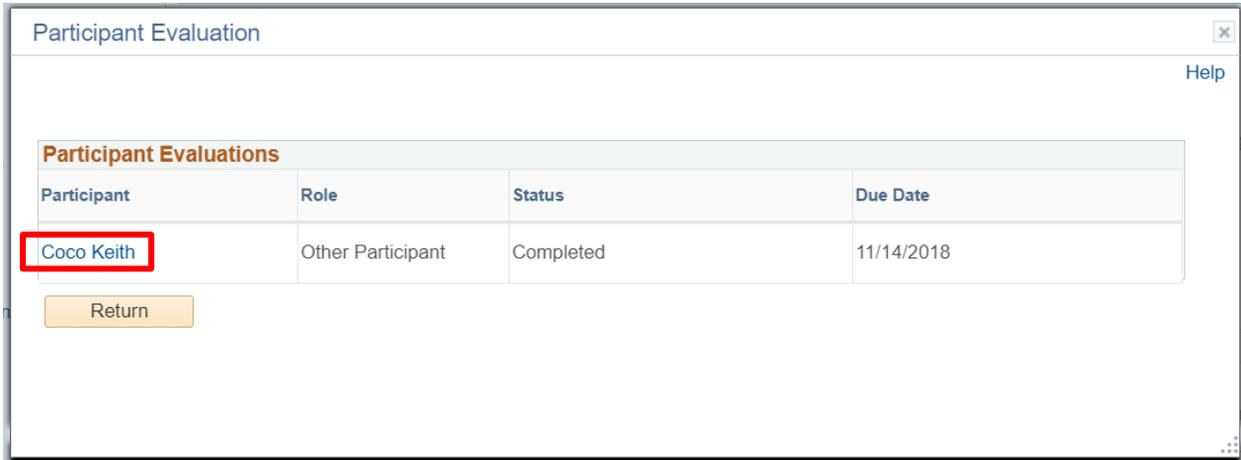
Rating History

Other Participants

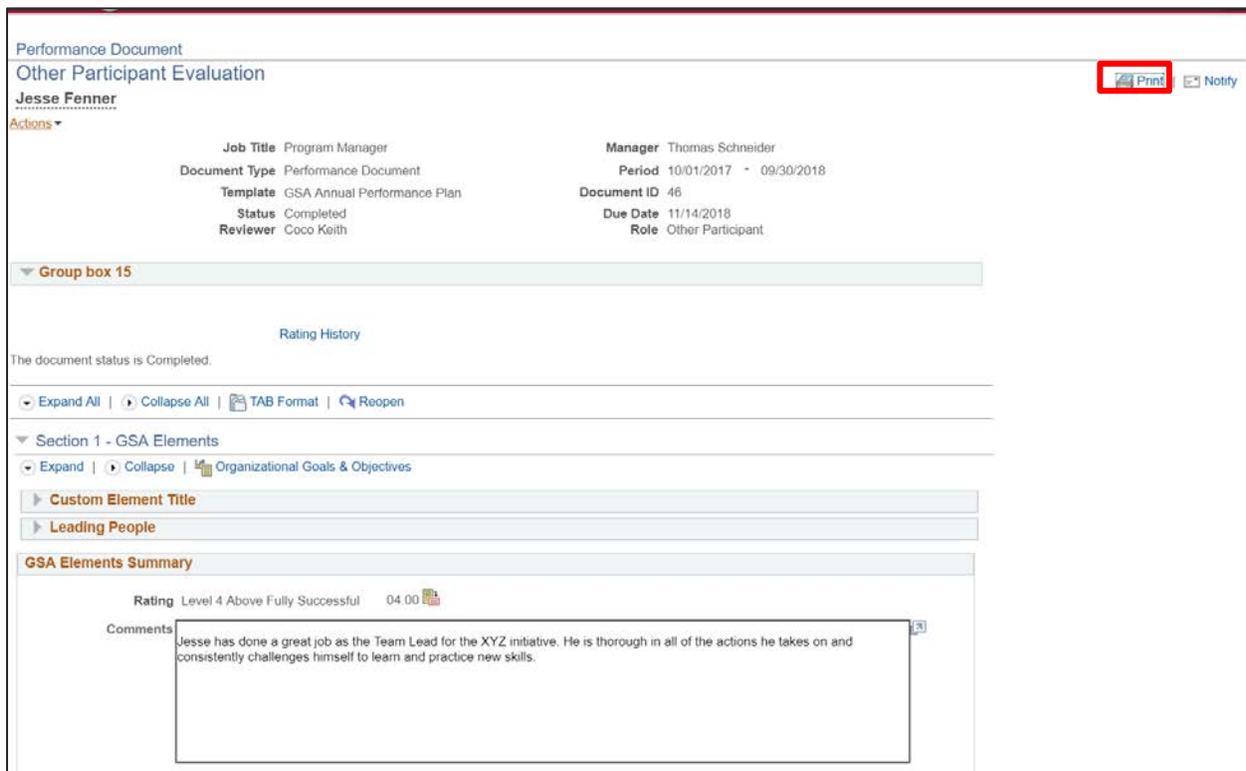
Coco Keith - Program Analysis Officer

Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.

- 17 From the Participant Evaluation pop-up, click the name of the participant for which you want to review their evaluation of the employee.



- 18 The completed participant evaluation will open in a new tab or window. Make sure you turn off your pop-up blocker. Review and/or print the participant evaluation in preparation for completing the employee's evaluation.



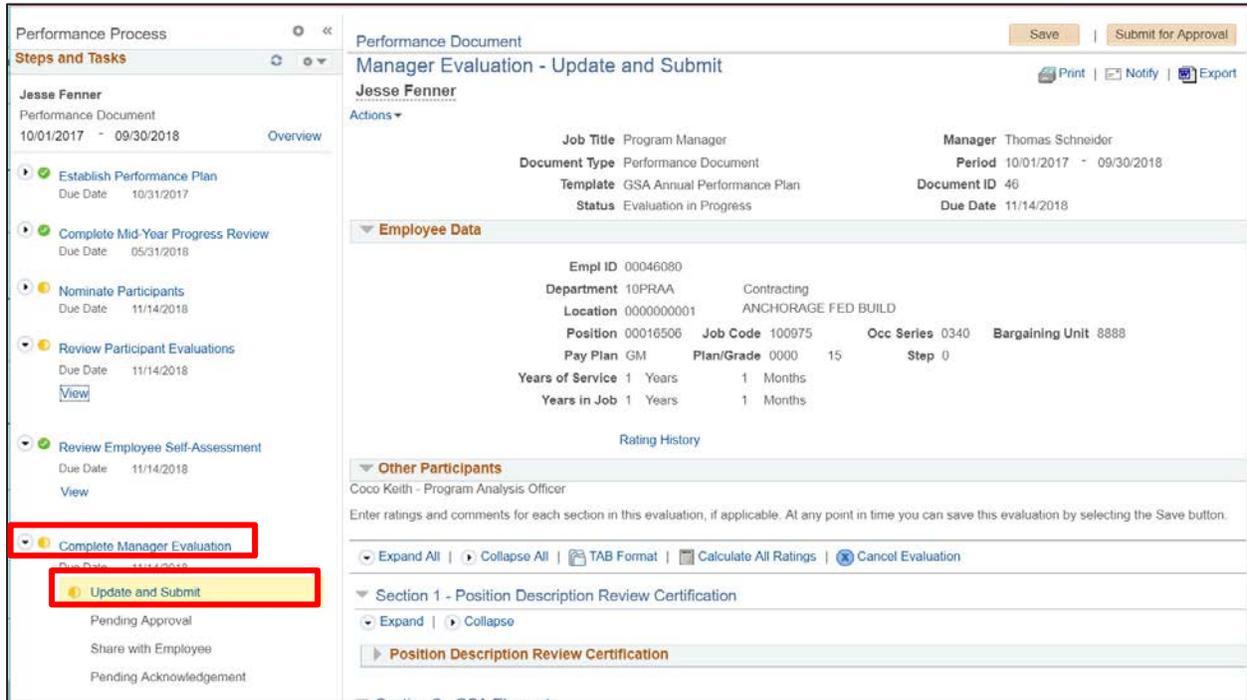
TOPIC 3.5: SUBMIT EVALUATION

This topic will cover submitting an employee evaluation, after tracking employee progress and reviewing both the employee self-assessment and participant evaluations, if applicable.

- 1 Return to the employee's performance document by accessing the Manager Self-Service fluid page.

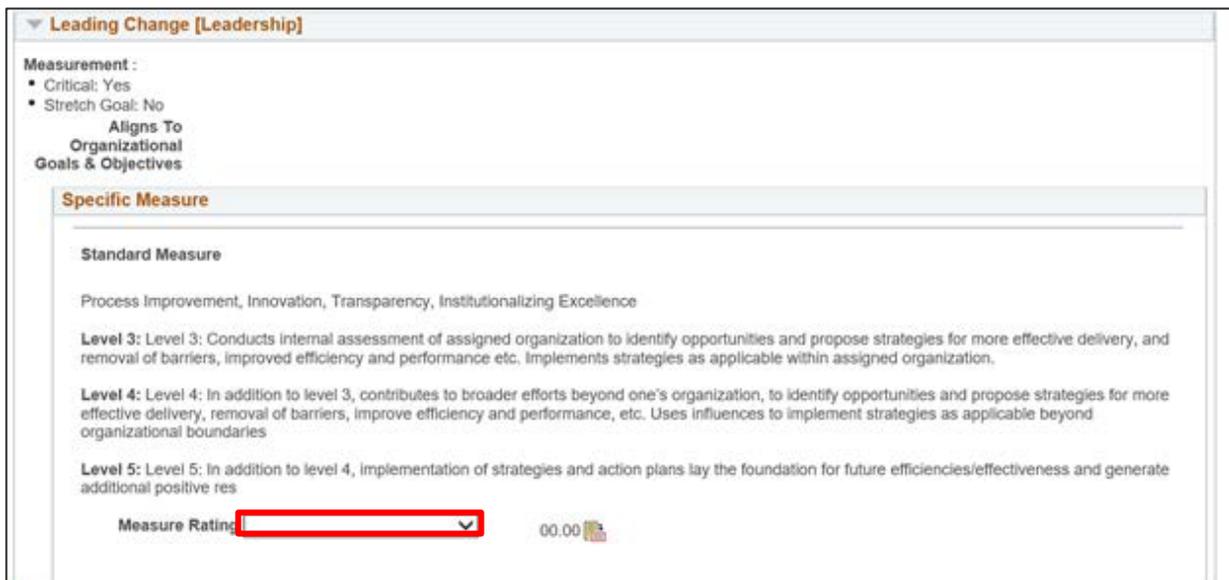
- 2 Click the Team Performance tile.
- 3 Click to open the employee's performance document.

Note: If you are already in the employee's performance document and you would like to begin finalizing the employee's evaluation, use the sidebar navigation. Click *Complete Manager Evaluation*, then click **Update and Submit**. If you are returning to HR Links to begin finalizing the evaluation, you will automatically be directed to this page.

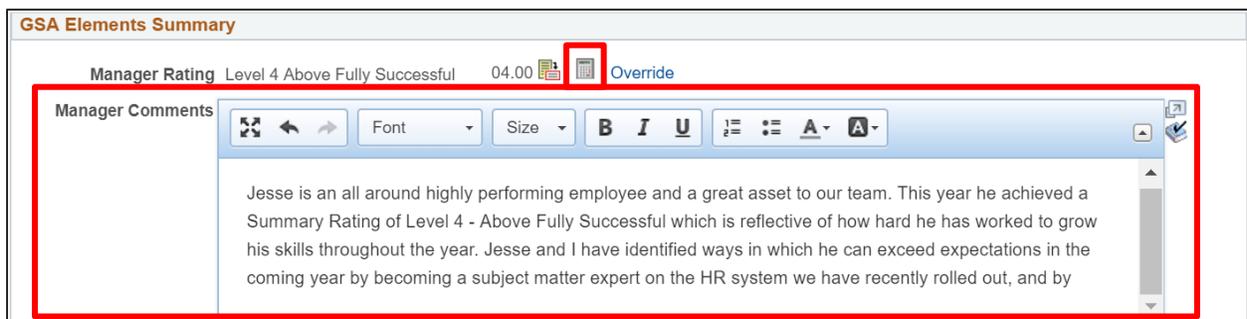


- 4 Select specific measure and element ratings for each performance element. Enter text in the *Manager Comments* textboxes, as applicable.

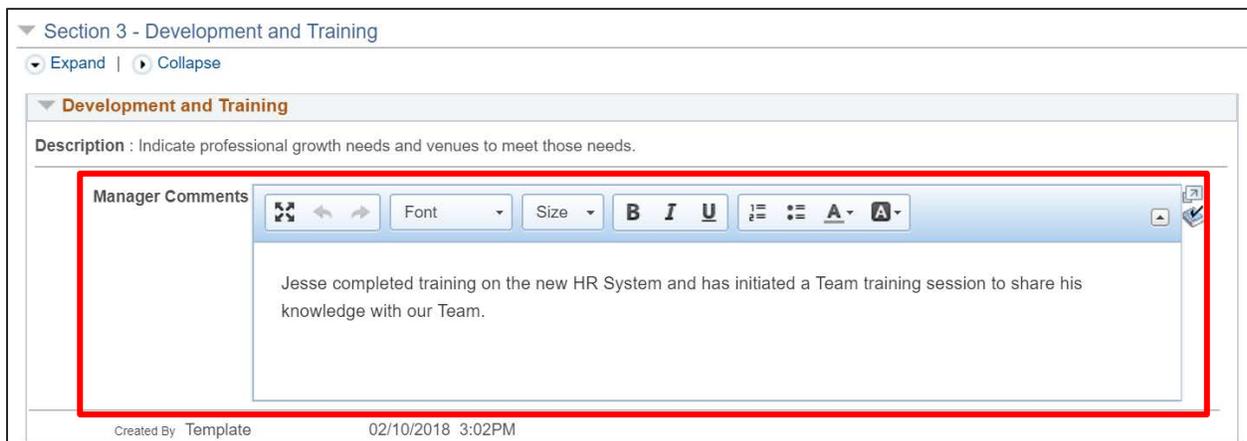
Note: You are required to enter a rating for all specific measures and elements. If you are unable to rate an element or sub-element, use the "NR – Not Rated" or "Unrateable" rating options as appropriate.



- 5 Enter comments in the *Manager Comments* textbox.
- 6 Click the calculator button to calculate the employee's Summary Rating.



- 7 If desired, enter additional comments in the *Manager Comments* textbox in the Development and Training section.



- 8 Click **Save** to return to the evaluation at a later time.
- 9 If you have finalized your comments and are ready to submit the evaluation, click **Submit for Approval**.



- 10 On the **Submit for Approval** page, modify the performance period begin and end dates by clicking the calendar icon, if necessary.
- 11 Select the appropriate rating type by reviewing the rating type descriptions.

Note: The following rating types require the employee to be on a performance plan for 120 days (beginning the date the Supervisor signed the employee’s performance plan) prior to submitting: Rating of Record (Annual), Summary Rating (Interim), and Off-Cycle Rating of Record.

- 12 Review the information provided about the rating approval process. In summary, if the employee has received a Summary Rating of Level 1 or 5, the evaluation will automatically be routed to the employee’s 2nd level supervisor (the employee’s supervisor’s supervisor) for approval. See Section 4 for instructions on approving/denying a rating.
- 13 If the employee has received a Summary Rating of Level 2, 3 or 4, you are required to share the evaluation with the employee immediately after clicking **Confirm** on the *Submit for Approval* page.

The screenshot shows a web form titled "Submit for Approval". It has two main sections: "Validate Dates" and "Identify Rating Type".

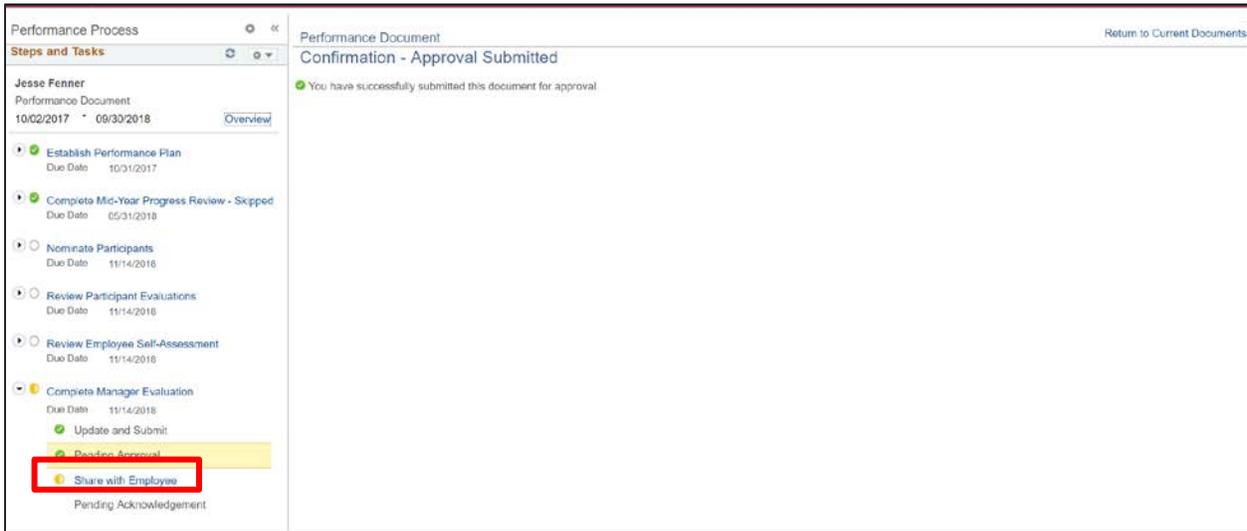
Validate Dates: This section contains two date fields. The first is labeled "*Period Begin Date" and has the value "10/01/2018". The second is labeled "*Period End Date" and has the value "09/30/2019". Both date fields have a small calendar icon to their right.

Identify Rating Type: This section contains four radio button options, each with a descriptive paragraph below it. The first option, "Rating of Record (Annual)", is selected and highlighted with a red rectangular box. The other three options are "Summary Rating (Interim)", "Off-Cycle Rating of Record", and "Unrateable (less than 120 Days)".

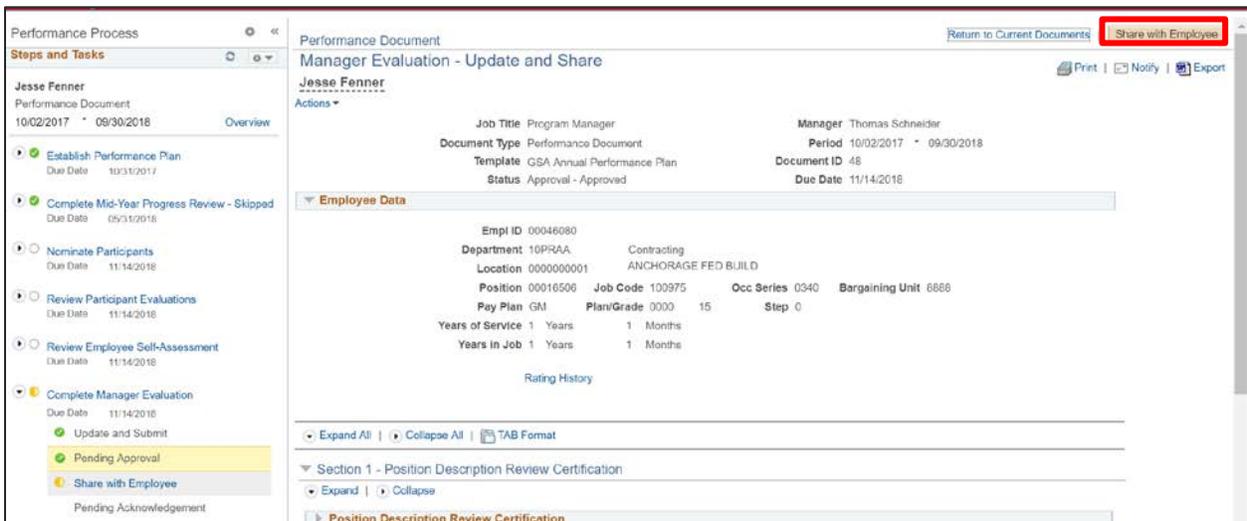
- 14 If the employee received a Summary Rating of 2, 3 or 4, or if you have received a notification that the 2nd level reviewer has approved the Summary Rating of Level 1 or 5, click **Share with Employee**.

Note: If the 2nd level reviewer denied the Summary Rating of Level 1 or 5, you will be required to return to the system to modify, if applicable, and resubmit the evaluation.

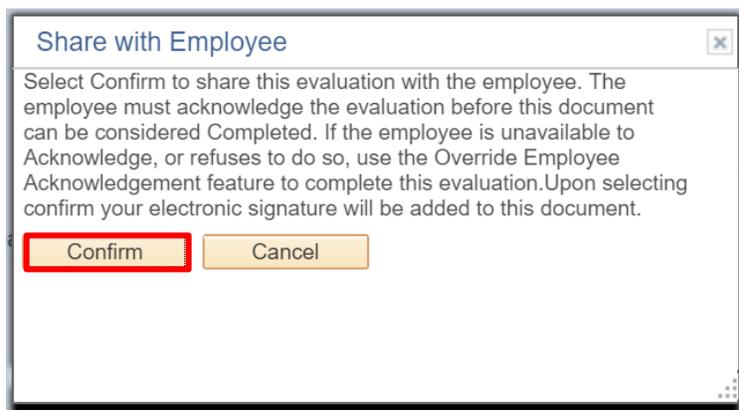




15 Click Share with Employee.



16 Click Confirm.



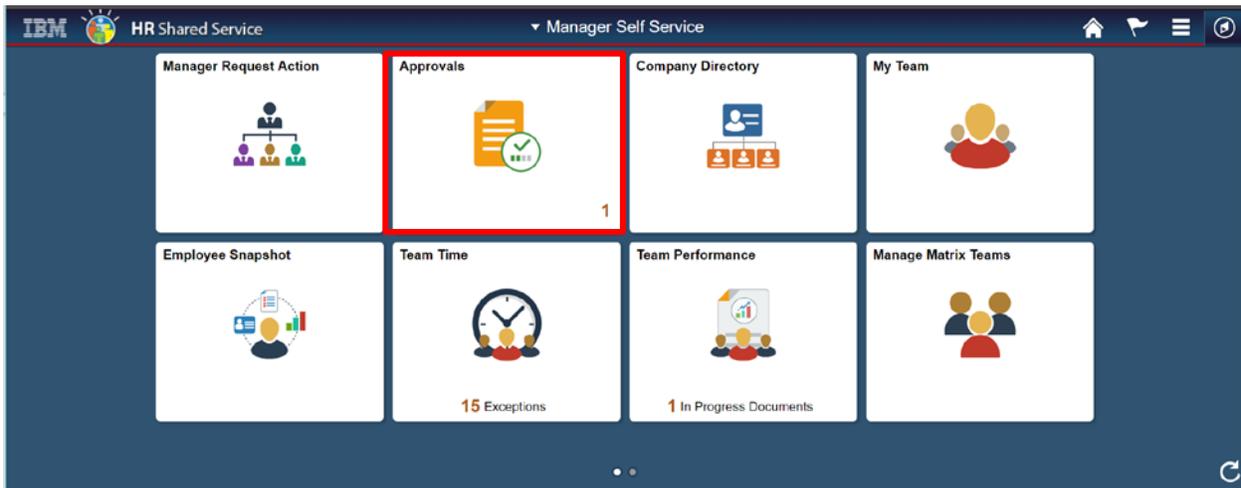
SECTION 4: APPROVE/DENY RATING

TOPIC 4.1: APPROVE/DENY RATING

If an employee has received a Summary Rating of Level 1 or 5, the evaluation will automatically be routed to the employee's 2nd level supervisor (the employee's supervisor's supervisor) for approval. To approve or deny a Summary Rating of Level 1 or 5, the employee's 2nd **Level Supervisor** must follow the instructions below.

- 1 Access the Manager Self-Service fluid page in HR Links. Click the **Approvals** tile, shown below.

Note: If there are one or more documents pending approval, a number will be shown in the lower right corner of the Approvals tile.

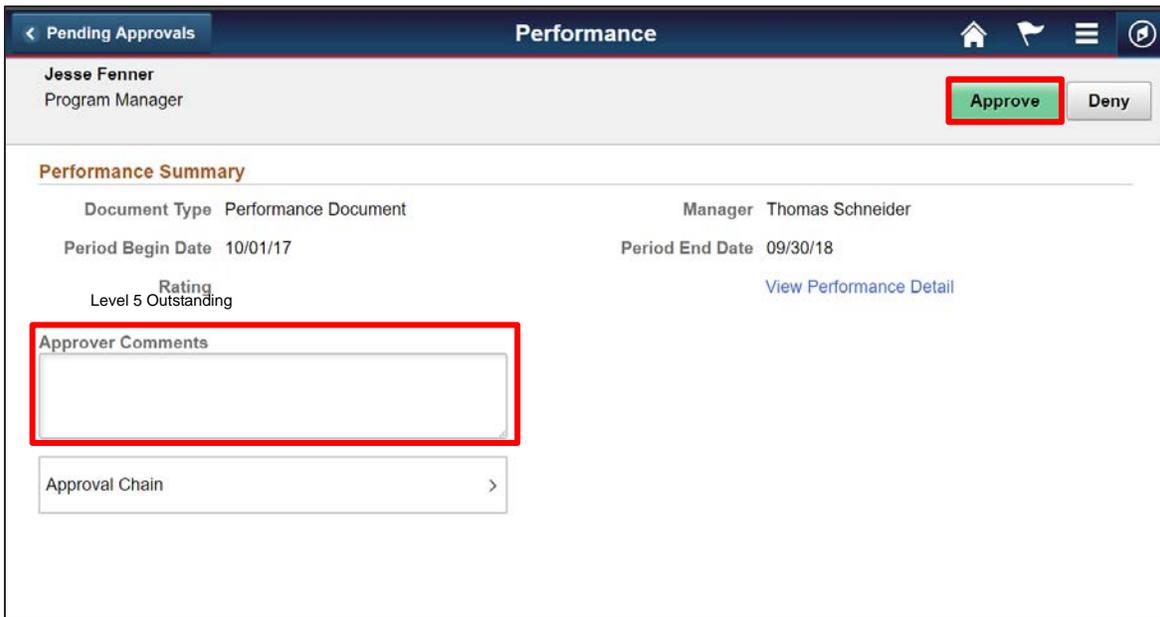


- 2 On the *Pending Approvals* page, click the document with "Performance" listed above the employee's name.

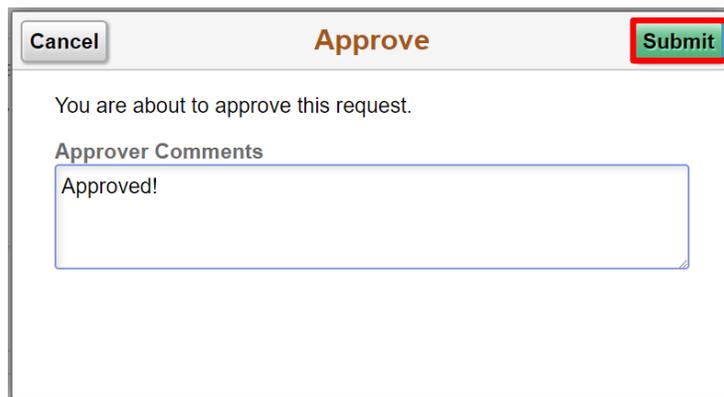
Note: If you have multiple approvals, click Performance on the left menu to filter to only performance management approvals.



- 3 Review the employee's Rating in the *Performance Summary* section.
- 4 To view the employee's detailed evaluation, click the **View Performance Detail** link.
- 5 If you are ready to Approve/Deny, enter comments in the *Approver Comments* section, as applicable.
- 6 If approving, click **Approve**.



7 Enter or finalize your Approver Comments. Click **Submit**.



8 If denying the rating, click **Deny**.

9 Enter or finalize Approver Comments and click **Submit**.

