



General Services Administration

## **ePerformance in HR Links** *Creating a Performance Plan & Mid Year Reviews Quick Guide*



5/24/18

# Supervisor Signature Process - Options



## **Complete a Performance Plan in HR Links Options (Slides 3- 18):**

1. Supervisor and Employee sign Performance Plan
2. Supervisor signs Performance Plan and overrides Employee signature

## **Complete a Mid-Year Progress Review in HR Links Options (Slides 19-29):**

1. Supervisor Skips Mid-Year Progress Review
2. Supervisor Completes Mid-Year Progress Review

## **Additional Resources (Slide 30)**

# Complete Performance Plan

## OPTIONS 1 & 2

# Option 1

**SUPERVISOR AND EMPLOYEE SIGN PERFORMANCE PLAN**

# Option 1 – Employee & Supervisor Sign

GSA

## Supervisor Click 1

Supervisor clicks “Team Performance” tile on Manager Self Service page

The screenshot displays the IBM HR Shared Service Manager Self Service interface. The top navigation bar includes the IBM logo, 'HR Shared Service', and 'Manager Self Service'. The main content area is divided into several tiles:

- Open Jobs:** Shows 0 jobs.
- Company Directory:** Shows a hierarchical organizational chart.
- Team Performance:** Highlighted with a red box and a red arrow. It shows 25 In Progress Documents.
- Absence Analytics:** Shows a briefcase icon and a pie chart.
- Team Performance Status:** Shows a pie chart with the following data:

Status	Percentage
Complete Mid-Y...	14%
Completed	11%
Define Criteria	36%
Evaluation in Pr...	36%
Pending Acknow...	4%

# Option 1 - Employee & Supervisor Sign



## Supervisor Click 2

*Supervisor clicks employee's record*

Manager Self Service | Team Performance

Current Documents Create Documents

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
<b>Margaret Parker</b> Occupational Therapist	74 Performance Document	Define Criteria 	10/02/2017 09/30/2018	10/31/2017 >

# Option 1 - Employee & Supervisor Sign



## Supervisor Clicks 3 & 4

3. Supervisor clicks "Sign and Submit"

4. Supervisor clicks "Confirm"

IBM HR Shared Service HCM92DEV

Performance Process

Steps and Tasks

Margaret Parker  
Performance Document  
10/01/2017 - 09/30/2018 Overview

- 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

Establish Margaret Parker

Actions

Review the performance adjustments to complete this

Long Form

Review PD

Section

GSA Element

Expand

Organizational

Individual Accountability

Project Management

Save Sign and Submit

Print | Notify | Export

Donald  
- 09/30/2018

Method. Make any necessary adjustments and Submit" button to

Sign and Submit Performance Criteria

Select confirm to approve and sign the employee's Performance Plan. A request will be sent to the employee asking them to acknowledge that they have read and discussed this document with you. The employee must acknowledge the Plan before the document is considered Complete. If the employee is unavailable to sign or refuses to sign, you must override the employee's acknowledgment to complete the Performance Plan.

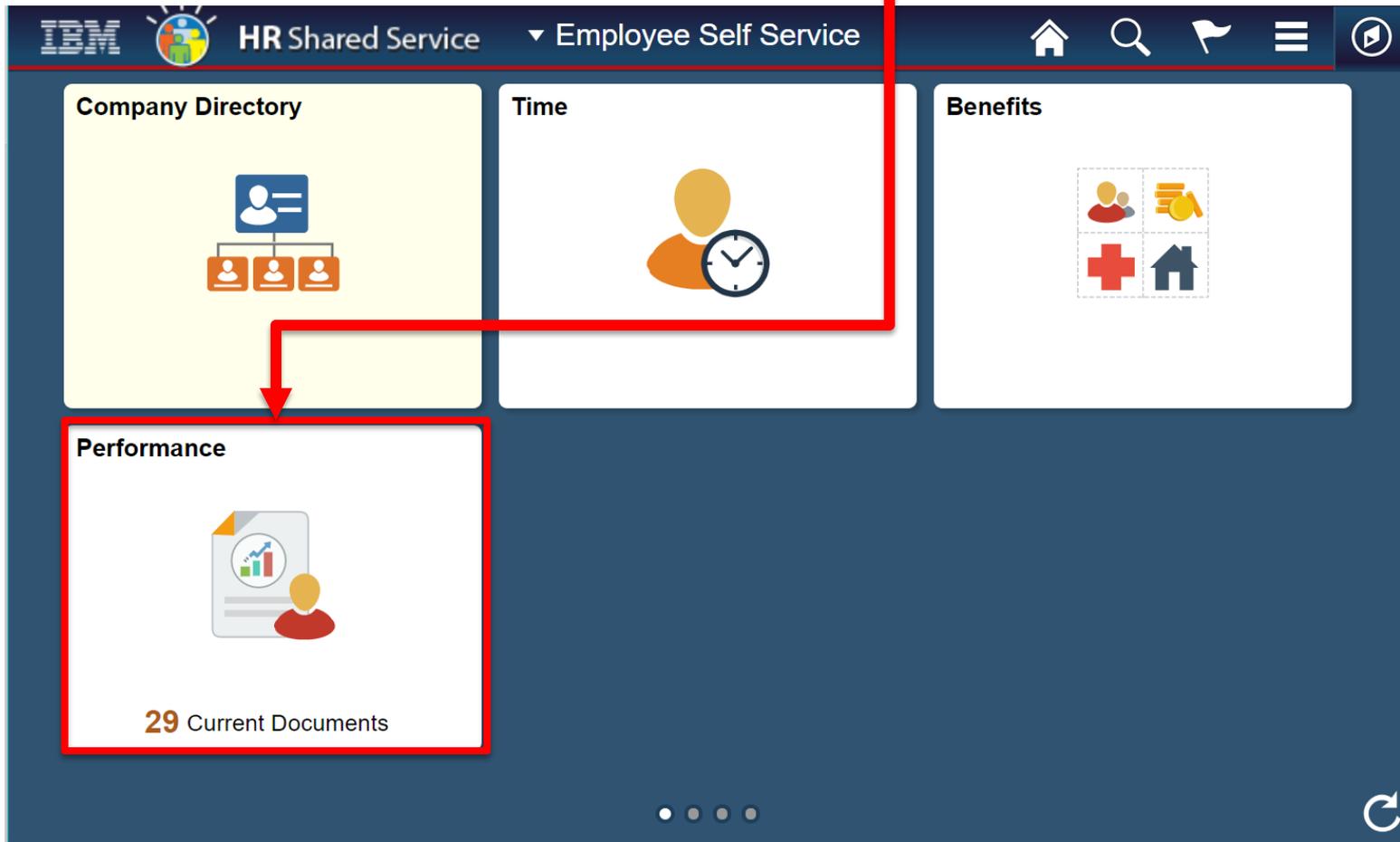
Confirm Cancel

# Option 1 - Employee & Supervisor Sign

GSA

## Employee Click 1

Supervisor clicks "Sign and Submit"



# Option 1 - Employee & Supervisor Sign



## Employee Click 2

*Employee clicks employee's performance document*

**Employee Self Service** Performance

Margaret Parker Occupational Therapist

**My Current Documents** [Create Document](#)

Document Type	Document Status	Period Begin / Period End	Next Due Date
74	Define Criteria	10/02/2017	10/31/2017 >
Performance Document		09/30/2018	

# Option 1 - Employee & Supervisor Sign

GSA

## Employee Clicks 3, 4 & 5

3. Employee clicks "Acknowledge"
4. Employee selects Agree or Disagree (enters comments, if applicable)
5. Employee clicks "Confirm"

Performance Process

Steps and Tasks

Margaret Parker

Performance Document

10/02/2017 - 09/30/2018

Establish Performance Plan

Due Date 10/31/2017

Acknowledge

Complete Mid-Year Progress Review

Due Date 05/31/2018

Nominate Participants

Due Date 11/14/2018

Complete Self-Assessment

Due Date 11/14/2018

Review Manager Evaluation

Due Date 11/14/2018

Performance Document

Establish Performance Plan - Update

Margaret Parker

Job Title Occupational Therapist

Document Type Performance Document

Template GSA Annual Performance Plan

Status Pending Acknowledge

Manager Duncan McDonald

Period 10/02/2017 - 09/30/2018

Document ID 74

Due Date 10/31/2017

Acknowledge

Use the selections below to certify that your supervisor has discussed performance expectations with you and that you have been provided with a copy of your performance plan. Your designation below will certify that you either agree or disagree with your performance plan. If you select "I disagree," please provide an explanation in the text box provided below.

I agree

I disagree

Upon selecting confirm, you are acknowledging that the review was held and your electronic signature will be added to this document.

Confirm



# Plan Complete

# Option 2

**SUPERVISOR SIGNS PLAN AND OVERRIDES EMPLOYEE SIGNATURE**

# Option 2 – Supervisor Signs & Overrides



## Supervisor Click 1

Supervisor clicks “Team Performance” tile on Manager Self Service page

The screenshot displays the IBM HR Shared Service Manager Self Service interface. The top navigation bar includes the IBM logo, 'HR Shared Service', and 'Manager Self Service'. The main content area is divided into several tiles:

- Open Jobs:** Shows 0 jobs.
- Company Directory:** Shows a hierarchical organizational chart.
- Team Performance:** Highlighted with a red box and a red arrow. It shows 25 In Progress Documents.
- Absence Analytics:** Shows a briefcase icon and a pie chart.
- Team Performance Status:** A pie chart showing the distribution of performance documents across different stages.

Status	Percentage
Complete Mid-Y...	14%
Completed	11%
Define Criteria	36%
Evaluation in Pr...	36%
Pending Acknow...	4%

# Option 2 – Supervisor Signs & Overrides



## Supervisor Click 2

Supervisor clicks employee's performance document

Manager Self Service **Team Performance**

Create Documents

Current Documents

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
<b>Margaret Parker</b> Occupational Therapist	74 Performance Document	Define Criteria 	10/02/2017 09/30/2018	10/31/2017 >

# Option 2 – Supervisor Signs & Overrides



## Supervisor Clicks 3 & 4

3. Supervisor clicks “Sign and Submit”

4. Supervisor clicks “Confirm”

The screenshot displays the IBM HR Shared Service HCM92DEV interface. On the left, a sidebar shows the 'Performance Process' for Margaret Parker, with 'Establish Performance Plan' as the current step. The main area shows the 'Performance Document' for Margaret Parker, with a 'Sign and Submit Performance Criteria' dialog box open. The dialog box contains the following text: 'Select confirm to approve and sign the employee's Performance Plan. A request will be sent to the employee asking them to acknowledge that they have read and discussed this document with you. The employee must acknowledge the Plan before the document is considered Complete. If the employee is unavailable to sign or refuses to sign, you must override the employee's acknowledgment to complete the Performance Plan.' The dialog box has 'Confirm' and 'Cancel' buttons at the bottom. The 'Sign and Submit' button in the top right of the main interface is highlighted with a red box, and a red arrow points from it to the 'Confirm' button in the dialog box. Another red arrow points from the 'Confirm' button back to the 'Sign and Submit' button.

# Option 2 – Supervisor Signs & Overrides



## Click 5

*Supervisor clicks “Establish Performance Plan” to expand options, then clicks “Override Acknowledgment”*

The screenshot displays the IBM HR Shared Service HCM92DEV interface. The top navigation bar includes the IBM logo, 'HR Shared Service', and 'HCM92DEV'. The main content area is titled 'Performance Process' and 'Performance Document'. The user is identified as Margaret Parker, with a performance document period from 10/02/2017 to 09/30/2018. The 'Steps and Tasks' section lists several tasks, with 'Establish Performance Plan' and 'Override Acknowledgement' highlighted in red boxes. Red arrows point from the text above to these two tasks. Other tasks listed include 'Complete Mid-Year Progress Review', 'Nominate Participants', 'Review Participant Evaluations', 'Review Employee Self-Assessment', and 'Complete Manager Evaluation'. The interface also shows a 'Reopen' button and a 'Return to Current Documents' link.

# Option 2 – Supervisor Signs & Overrides



Click 6

Supervisor clicks "Override Acknowledgment"

The screenshot displays the IBM HR Shared Service interface. At the top, the navigation bar includes the IBM logo, 'HR Shared Service', and 'HCM92DEV'. A red arrow points from the text 'Click 6' to the 'Override Acknowledgment' button in the top right corner of the document header. The main content area shows a 'Performance Document' for 'Margaret Parker' with the title 'Establish Performance Plan - Update and Approve'. A modal dialog box titled 'Acknowledge' is open, containing the text: 'You have chosen to override your employee's acknowledgement of this performance document. Please indicate the reason for completing the override:'. Two radio button options are visible: 'Employee Not Available' (which is selected and highlighted with a red box) and 'Employee Refused'. Below the options are 'Confirm' and 'Cancel' buttons, with the 'Confirm' button also highlighted with a red box. The left sidebar lists various performance tasks with their due dates. The right sidebar shows additional document details and actions like 'Print', 'Notify', and 'Export'.

# Plan Complete

# Complete Mid-Year Progress Review

## OPTIONS 1 & 2

# Option 1

## SUPERVISOR SKIPS MID-YEAR PROGRESS REVIEW

***NOTE: 5 CFR 430.207(B) requires a progress review only in limited circumstances should the review be skipped. Contact [YOUR SERVICING HR OFFICE](#) for assistance.***

# Option 1 – Supervisor Skips Review



## Click 1

Supervisor clicks employee record

The screenshot shows the 'Manager Self Service' interface for 'Team Performance'. On the left, there are tabs for 'Current Documents' (with a count of 28) and 'Historical Documents'. The main area displays a table of 'Current Documents' with a 'Create Documents' button in the top right. The table has the following columns: Name / Job Title, Document Type, Document Status, Period Begin / Period End, and Next Due Date. The first row is highlighted with a red border and a red arrow points to it from the text above.

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
<b>Margaret Parker</b> Occupational Therapist	74 Performance Document	Track Progress - Complete Mid-Year Progr 	10/02/2017 09/30/2018	05/31/2018 >

# Option 1 – Supervisor Skips Review



## Clicks 2 & 3

Supervisor clicks “Skip Mid-Year Progress Review”  
Supervisor clicks “Confirm”

The screenshot displays the IBM HR Shared Service HCM92DEV interface. The top navigation bar includes the IBM logo, 'HR Shared Service', and 'HCM92DEV'. The main content area shows a 'Performance Document' for 'Margaret Parker' with a 'Complete Mid-Year Progress Review - Update and Share' task. A modal dialog box titled 'Skip Mid-Year Progress Review' is open, containing the text 'Select Confirm to skip this Mid-Year Progress Review.' and two buttons: 'Confirm' and 'Cancel'. Red arrows indicate the sequence of clicks: one from the 'Skip Mid-Year Progress Review' button in the top right of the document area to the dialog box, and another from the 'Confirm' button in the dialog box to the 'Confirm' button in the dialog box.

# Option 1 – Supervisor Skips Review



## Click 1

Supervisor clicks employee record

The screenshot shows the 'Team Performance' section of the Manager Self Service interface. On the left, there is a sidebar with 'Current Documents' (28) and 'Historical Documents'. The main area displays a table of 'Current Documents' with a 'Create Documents' button. The table has the following columns: Name / Job Title, Document Type, Document Status, Period Begin / Period End, and Next Due Date. The first row is highlighted with a red border and contains the following data:

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
<b>Margaret Parker</b> Occupational Therapist	74 Performance Document	Track Progress - Complete Mid-Year Progr 	10/02/2017 09/30/2018	05/31/2018 >

# **Mid-Year Progress Review Skipped**

# Option 2

**SUPERVISOR COMPLETES MID-YEAR PROGRESS REVIEW**

# Option 2 – Supervisor Completes Mid-Year Review



## Click 1

Supervisor clicks employee record

The screenshot shows the 'Manager Self Service' interface for 'Team Performance'. On the left, there are tabs for 'Current Documents' (with a count of 28) and 'Historical Documents'. The main area displays a table of 'Current Documents'. A red arrow points from the text 'Supervisor clicks employee record' to the 'Margaret Parker' row in the table. The row is highlighted with a red border.

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
<b>Margaret Parker</b> Occupational Therapist	74 Performance Document	Track Progress - Complete Mid-Year Progr 	10/02/2017 09/30/2018	05/31/2018 >

# Option 2 – Supervisor Completes Mid-Year Review



## Clicks 2 & 3

Supervisor clicks "Sign and Submit"

Supervisor clicks "Confirm"

The screenshot displays the IBM HR Shared Service HCM92DEV interface. The main content area shows a performance document for Margaret Parker, with a 'Sign and Submit' button highlighted in a red box. A modal dialog titled 'Sign and Submit Mid-Year Progress Review' is open, containing the following text: 'Select "Confirm" to sign and submit this Mid-Year Progress Review. A request will be sent to the employee asking him/her to acknowledge that he/she has reviewed the Evaluation. The employee must acknowledge the Mid-Year Progress Review before it is considered complete. NOTE: The employee has not completed their input into the Mid-Year Progress Review. If you sign and submit this evaluation now the employee will not be able to provide input.' The 'Confirm' button in the modal is also highlighted in a red box. Red arrows indicate the flow from the 'Sign and Submit' button in the main interface to the 'Confirm' button in the modal.

# Option 2 – Supervisor Completes Mid-Year Review

GSA

*To Complete the Review, Supervisor must Override employee Acknowledgment, or the Employee must Acknowledge the Review. Processes mirror the processes outlined in Section 1: Complete Performance Plan*

**Override:**

The screenshot shows the 'Performance Document' page for Margaret Parker. The 'Steps and Tasks' sidebar on the left includes 'Establish Performance Plan', 'Complete Mid-Year Progress Review' (with sub-tasks 'Update and Submit' and 'Override Acknowledgment'), 'Nominate Participants', and 'Review Participant Evaluations'. The main content area shows the document details for Margaret Parker, including Job Title (Occupational Therapist), Manager (Duncan McDonald), and Document ID (74). An 'Override Acknowledgment' dialog box is open in the center, with the text: 'You have chosen to override your employee's acknowledgement of this performance document. Please indicate the reason for completing the override.' The dialog has two radio button options: 'Employee Not Available' (which is selected) and 'Employee Refused'. There are 'Confirm' and 'Cancel' buttons at the bottom of the dialog.

**Employee Acknowledge:**

The screenshot shows the 'Performance Document' page for Margaret Parker in the IBM HR Shared Service HCM92DEV system. The 'Steps and Tasks' sidebar on the left includes 'Establish Performance Plan', 'Complete Mid-Year Progress Review' (with sub-tasks 'Complete Employee Midpoint' and 'Acknowledge Midpoint'), and 'Nominate Participants'. The main content area shows the document details for Margaret Parker, including Job Title (Occupational Therapist), Manager (Duncan McDonald), and Document ID (74). An 'Override Acknowledgment' dialog box is open in the center, with the text: 'Your comments are currently not shared with your manager. Use the "Employee Comments" text fields below to track your progress... click the "Share with Manager" button to save your work and notify your manager... his/her evaluation prior to you submitting your Self-Assessment, you will submit your Self-Assessment and communicate with your Manager as part of your Mid-Year Progress Review and click "Acknowledge" to certify your review.' The dialog has two radio button options: 'Employee - Complete Checkpoint' (which is selected) and another option that is partially obscured. There are 'Confirm' and 'Cancel' buttons at the bottom of the dialog.

# Mid-Year Progress Review Completed

### **Performance Management For Employees Module 23:**

1. Visit [HR Links](#) Training Page
2. Reference Manual Sections 1 & 2

### **Performance Management For Supervisors Module 24:**

1. Visit [HR Links](#) Training Page
2. Reference Manual Sections 1 & 2

### **Need more help:**

1. [Servicing HR Office](#)