Action	Instruction
Mark review held	
Choose employee	Click the "Annual Employee Review" next to the appropriate employee.
Enter the document	Click the "Mark Review Held" Link next to the appropriate employee.
Mark review held	Click "Review Held."
Confirm	Click "OK."

Step 6 – Complete/Close the document

Action	Instruction
Log into PeopleSoft and go to ePerformance	To access screen: Manager Self Service ➤ Performance Management ➤ Performance Documents ➤ Current Documents
Select an employee	Click "Annual Performance Review" Next to the appropriate employee.
Enter the document	Next to "Complete Manager's Evaluation" click Complete.
Complete	Click the "Complete" button.
Confirm complete	Click "Complete."
Finish	Click "OK."

PROCESS FOR EMPLOYEES WITHOUT COMPUTER ACCESS

If your employees do not have access to a computer they can still be actively involved in managing their own performance. You can sit with the employee at your computer and make changes together or you can enter the employee's changes in the computer yourself. Another option is to have the employee work from a printed/hard copy of the document.
Step 4 in the above section outlines instructions for printing the document.

Here are some of the changes you can make:

Step 1 – Establish Criteria
During the planning stage, provide employee a copy of their performance plan and allow them to write their comments and ideas on the hard copy. Then, together you will decide what the final plan will look like. After that you can make the final changes to the plan.

Step 2 – Performance Notes
Employees will need to track their own performance notes in a separate paper file.

Step 3 – Performance Evaluation
In order for employees to complete their self-evaluation, you will need to give them access to your computer or have them complete the evaluation on a printed/hard copy of the plan.

Step 4 – Finalize Performance Document
After having the performance evaluation meeting with your employee, the employee will need to sign a hard copy of the evaluation or use your computer to acknowledge that their performance review was held.

Rating Scale

5 – Exceptional Performer
Employee exceeded all performance expectations. Employee was an exceptional contributor to the success of his/her department and the State of Georgia. He/she demonstrated role model behaviors.

4 – Successful Performer - Plus
Employee met all and exceeded most of the established performance expectations.

3 – Successful Performer
Employee met all performance expectations and may have exceeded some. Employee was a solid contributor to the success of his/her department and the State of Georgia.

2 – Successful Performance - Minus
Employee met most, but failed to meet some performance expectations. Employee needs to further improve in one of more areas of expected job results or behavioral competencies.

1 – Unsatisfactory Performer
Employee did not meet all or most of the established performance expectations. Employee needs significant improvement in critical areas of expected job results or behavioral competencies.

Not Rated
At the agency's discretion, a new hire or transfer within five months of the end of the performance period may or may not receive a performance rating.

Rounding Rules

0.0 - 1.49 = 1
1.5 - 2.49 = 2
2.5 - 3.49 = 3
3.5 - 4.49 = 4
4.5 - 5.00 = 5

Assistance

Please contact your HR Representative for Assistance.

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Manager System Job Aid

This job aid outlines the general steps a manager needs to take in PeopleSoft ePerformance in order to complete the different phases of the Georgia Performance Management Process.

Manager's Role

Phase 1: Performance Planning
1. Collaborate with employee to determine the performance expectations (competencies, goals, and responsibilities) for the upcoming plan year.
2. Enter the plan into the ePerformance system and submit for approval (if required).

Phase 2: Performance Coaching
1. Throughout the plan year, enter performance notes (if desired) for your employees. This helps to keep track of accomplishments and challenges.

Phase 3: Performance Evaluation
1. Review the employee's self-evaluation.
2. Complete your evaluation for the employee in the system.
3. Submit evaluation for approval.
4. Discuss and finalize the performance document.
   Note: The Mid Year (December – January) and Annual (July) evaluation steps will be the same.

Note: ePerformance is accessed through PeopleSoft Manager Self Service (MSS) / Employee Self Service (ESS).

https://team.state.ga.us/psp/saopa/EMPLOYEE/EMPL/h/?tab=PAPP_GUEST

Step 1 – Establish Criteria

Action	Instruction
Log into PeopleSoft and go to ePerformance	To access screen: Manager Self Service ➤ Performance Management ➤ Performance Documents ➤ Current Documents
Choose Employee	Click "Annual Performance Review" on the same line as the desired employee.
Start your entry	Click "Start" on the same line as "Establish Evaluation Criteria."
Section 1: Statewide Competencies	Review statewide core competencies. These are pre-populated. There are 5 core competencies and 2 leadership competencies. For some leadership positions the leadership competencies do not preload into this section. You need to enter them into section 2.
Section 2: Add Individual Goals and Competencies	Click on "Add Individual Goals/ Competencies." Two types: pre-defined and free form.
A. Pre-defined	Click "Add a pre-defined item."
There are 14 pre-defined competencies	Click "Next."
Choose items	Click "Search." Click the desired boxes.
Complete choice	Click "Save."
B. Add free-form goal	Click on "Add Your Own Item."
Enter information	Enter a "Title" and a "Description." Click "Update."
Section 3: Job Responsibilities	Section is prepopulated for agencies on the statewide salary plan. You can add and delete responsibilities in this section.
A. Add	Click "Add a Job Responsibility." Enter a "Title" and a "Description." Click "Update."
B. Delete	Click "Delete All Job Responsibilities." OR Click "Delete" under individual responsibilities to delete them.
Section Weights	Review the weighting for each section and ensure they are in line with agency guidelines.

Action	Instruction
Section 4: Individual Development Plan	Click on "Add Individual Development Plan" to add an item. Enter Title and Description Click "Update" to add
Complete Performance Plan	You may click "Save" if you wish to exit this phase to return later. OR You may click "Complete" to finish this step.

Step 2 – Performance Notes

Action	Instruction
Log into PeopleSoft and go to ePerformance	Access screen: Manager ➤ Self Service ➤ Performance Management ➤ Maintain Performance Notes
Choose an employee	Select an Employee ID.
Add a new note	Click "Add a new note."
Enter note	Enter a subject and note text.
Complete the note	Click "Save" to exit the note.

Step 3 – Performance Evaluation

Action	Instruction
Log into PeopleSoft and go to ePerformance	To access screen: Manager Self Service ➤ ➤ Performance Management ➤ My Performance Documents ➤ Current Documents
Review employee self-evaluation	
Review the document	Click the "Annual Performance Review" link next to appropriate employee.
View	Click "View" on the same line as "Review Self-Evaluation."
Enter evaluation information	
Log into MSS/ESS and go to ePerformance	To access screen: Manager Self Service ➤ Performance Management ➤ My Performance Documents ➤ Current Documents.
Enter the document	Click the "Annual Performance Review" link next to appropriate employee.
Enter Comments and Ratings	Enter comments in each comment box to justify ratings from the drop down lists for each competency, goal, and/or job responsibility.

Action	Instruction
Section rating	Click the "Calculator" button to calculate the average rating for each section (no weighting applied). Be aware that the employee's average rating will appear also.
Calculate Overall Performance Rating	Click the "Calculate all Ratings" button to calculate the overall rating for the entire evaluation (based upon section ratings and weights). Normal rounding rules apply.
Review IDP	Review the IDP and make comments on progress.
Submit	Click "Submit for Approval" to complete the evaluation.
Confirm	Click "Submit" to confirm your submission.

Step 4 – Printing the Evaluation (if needed)

Action	Instruction
Log into PeopleSoft and go to ePerformance	To access screen: Manager Self Service ➤ Performance Management ➤ My Performance Documents ➤ Current Documents
Access the document	Click "Annual Performance Document."
Enter the document you want to print	Click "Edit" on the document you want to print: "Establish Evaluation Criteria," "Review Self Evaluation" or "Complete Manager Evaluation" line.
Print Format	Click "View Printable Evaluation Link."
Print Set Up	Click the following menu series: File – Page Setup – Landscape – OK.
Print the document	Click "File", then "Print" from the menu.

Step 5 – Finalize Performance Document (after HR Approval)

Action	Instruction
Log into PeopleSoft and go to ePerformance	To access screen: Manager Self Service ➤ Performance Management ➤ Performance Documents ➤ Current Documents
Choose employee	Click the "Annual Employee Review" next to the appropriate employee.
Enter the review	Click "Edit."
Enter the document	Click "Available for Review".
Confirm	Click "OK."
Performance Evaluation Meeting	Hold face-to-face meeting with employee to discuss the performance evaluation and ratings.