PERFORMANCE MANAGEMENT TRAIN-THE-HR SESSIONS
NOVEMBER 9 - 30, 2016
(UPDATED 11/16/2018)
Agenda

• Available Training Materials
• Key Dates to Remember for Performance
• Historical Performance Evaluations
• Review of What’s Changing (existing processes)
• New Human Resource Processes & Access
Training & Communication Materials

Key Dates to Remember for Performance Management

- Dec. 31, 2016
  - All Due and Past Due Evaluations (e.g., probationary) will be administratively closed
  - ALL evaluations plans will be locked to prevent further editing
  - Pending performance expectations must be acknowledged in order to be carried to the new system
- Jan. 1 – Feb 15, 2017 – Old Talent Management system is available in view only mode
- Jan. 7, 2017
  - New Talent Management is officially live
  - Old Talent Management system is available under My Quick Links as “Historical Talent Management”
  - Acknowledged performance expectations will be loaded from the 2016-2017 annual and probationary plans
- Feb. 15, 2017
  - Old Performance & Talent Management system is officially retired
  - Agency and service center access to old Talent Management system is removed (license expires); Old system can no longer be accessed by anyone
Historical Performance Data

• Performance evaluations and related attachments completed in the current Talent Management system (herein referred to as Historical Performance Data) will be loaded to the employee’s profile in the new Talent Management system.

• Previously completed performance evaluations and related attachments will be loaded as PDFs to each employee’s profile.

• Audit trail for historical evaluations will not be available; reporting will only be available on limited data from the People First Data Warehouse.
Sample of Historical Evaluations from the Employee’s Profile

<table>
<thead>
<tr>
<th>Year</th>
<th>Evaluation Title</th>
</tr>
</thead>
</table>
Overall Changes for New System

• New look, feel and navigation
• My Tasks are called To Do and include only current items requiring action
• Links include quick links to places within the Talent Management system and links to training materials for the new system (each user can add their own links based on their security role code)
• Delegation is replaced by Proxy
• Human resource roles of A, H and X will have additional access to complete key processes instead of having to call the service center for assistance
The Basics – System Requirements

• Why should you worry about the minimum system requirements? **User Experience!!!** If you use a non-supported browser version you may experience technical difficulties generally due to cache/cookie issues
  – Browsers – Internet Explorer 11 (note IE 9 and 10 are not supported in the Talent Management System), Latest version of Firefox
  – Platforms – Windows Vista, Windows 7 or 8; Apple Mac OS X Lion (10.7) or higher
  – Refer to [GC 274 Agency Tech Updates Jan 2017...](#) for additional information
    • Make sure your network team knows about these changes
The Basics - Emails

- Emails will still be sent to the owner of a step when they become the owner
- Grouped emails for
  - The initiations of employees into the plan (standard plan only)
  - Due date reminders
The Basics – Accessing the New Talent Management System

• Navigation to the New Talent Management System is the same navigation as used to access the current system
  – Log in to People First at PeopleFirst.myflorida.com
  – Select the Talent Management tile on the landing page to launch the New Talent Management system
The Basics – General System Navigation

- People First Logo and Home Icon – Select to return to the home page within the Talent Management system
- Home Navigation Dropdown Menu – Select to navigate to another section of the Talent Management system
- Search field – Search for an employee
- Account Navigation Dropdown Menu - (displays when you select your name)
  - Proxy – see slides below
  - Options – Select to personalize your experience (e.g., turn off emails)
  - Log Out – select to logout of the Talent Management system
The Basics – Talent Management Home Page

- The Talent Management Home Page has several tiles that provide various functionality
  - Training Resources – Takes you to the Department of Management Services Training Materials page for Performance Management and Recruiting
  - Quick Links – Provides quick links to places within the Talent Management system and links to training materials for the new system
  - Admin Favorites (HR ONLY) – Provides the ability to set quick links to administrator processes that can be performed by HR (discussed later)
  - My Profile – Provides quick access to your Employee (Talent) Profile
The Basics - Talent Management Home Page Concluded
The Basics – Active Employee Search

• To search for an active employee enter the name of the employee in the search box in the top right corner beside your name (step 1)

• Hover over the employee’s name to display the quick reference card, then select the action to take (step 2)

• Important Note: Access to see information is limited to basic information, to see requisitions you must use the Agency HR User role discussed later in this training
The Basics – Active Employee Search
Concluded

Step 1

Search for actions or people

Step 2

DMS HRUser (HR_DMS)
GENERIC HR USER
DMS - Management Svcs (7200)

no-email@sof.gov

0 Direct Reports 0 Team Size

Take Action

Go To
Talent Profile  Proxy
The Basics – Termed Employee Search

- To search for a terminated employee, select Employee Profiles from the Home navigation dropdown menu.
- Within the Employee Profile page, select the dropdown next to your Login ID, select the “Include inactive users in search” checkbox and enter the former employee’s name and press enter.
The Basics – Termed Employee Search Concluded

Step 1

Step 2
The Basics – Employee (Talent) Profile

• Two ways to access
  – Select Employee Profile(s) from the Home navigation dropdown menu; or
  – Select the My Profile tile in the My Info section on your Talent Management home page

• Contains two sets of data
  – Data loaded from the People First Human Resource system
The Basics – Org Chart

• Contains your reporting relationship as they exist in the People First Human Resource system
• Navigation up the Org Chart is controlled by security role code
• Not editable (not an Org Modeling Tool)
• Ability to save Org Chart as a PDF
The Basics – Org Chart Concluded
The Basics – Saving Data

• Auto Save – Occurs every 30 seconds; does not apply required field edits

• Manual save – save buttons and icons are generally located either in the top right section of the screen you are working in, or in the bottom of the screen below the screen content
  – When selecting Save the system validations are applied prior to saving your changes
Performance Management Changes to Existing Processes

• Performance evaluation process will be streamlined and will consist of one seamless flow (herein referred to as Performance Plan) that starts with setting the employee’s expectations and concludes with the employee’s acknowledgement of his or her performance evaluation

• If there is no available (top of agency) second-level manager, the second-level review step in the evaluation process will not be presented (systematically excluded from the evaluation process in this case)
  – Will continue to roll-up; this only applies if there is no one available to roll-up to
Performance Management Changes to Existing Processes Continued

• At the beginning of each evaluation plan year, job-specific expectations completed from the previous year will automatically populate the evaluation plan for the manager’s review and updating
• Employee specific performance plan dates for employees hired during the year and for probationary employees
• Additional human resource access
• Agency expectations will be editable by managers
• Comments are required for all expectations, regardless of score (yes, even 3!)
• No warning message is provided to the manager when giving a rating of 1 or 2 for an expectation
Performance Evaluation Form Navigation

• Form Navigation section allows you to select the specific category you would like to go to instead of having to scroll through the page (section quick links)

• Route Map section allows you to see the full performance plan flow, the status of each step (green check mark shows for completed steps)

• Employee Information section includes basic information about the employee (same concept as today)
  – Manager information is not displayed
Performance Evaluation Form

Navigation Concluded

• Performance Plan Period section displays the review period dates and the due date for completing the evaluation
  – Performance plan periods will be employee specific
  – Due date will be plan specific
  – Agency HR users (role codes A, H & X) will have access to update these dates
Performance Evaluation Route Map
Setting Expectations

• What’s Different!
  – Agency expectations
    • Can be added manually by managers (NOT employees)
    • Can be edited and or deleted by managers (NOT employees)
    • Agencies will need to provide all managers guidance on whether they should update agency expectations
  – Job Specific expectations will be copied from the prior evaluation at the beginning of the evaluation plan year

• What Doesn’t Change!
  – Job Specific expectations can be added, deleted, updated, etc.
  – Managers are responsible for ensuring expectations are appropriate for the employee
Acknowledging Expectations

• What’s Different!
  – Both the manager and the employee will have a To Do task to acknowledge receipt, not just the employee

• What Doesn’t Change!
  – Managers are still responsible for verbally discussing the evaluation with the employee and for encouraging the employee to acknowledge the expectations
  – If the manager acknowledges the expectations on behalf of the employee, the manager will be prompted to justify why they are completing on behalf of the employee
Monitoring & Evaluating the Employee

• What’s Different!
  – All expectations require a rating comment, regardless of the score (even 3)
  – Overall score will update once the entries are saved (auto save or manual save) instead of at the point the score for an expectation is selected
  – Ability to include attachments has been added back
  – Managers notepad will not be used

• What Doesn’t Change!
  – Managers are still responsible for evaluating their employees in accordance with agency policy
  – Ability to include overall comments about the employee’s performance
  – Only the manager can see the evaluation scores during this step
Second-Level Review

• What’s Different!
  – Ability to send the evaluation back to the manager for updating (e.g., typo’s exist) by selecting the Review Performance button at the bottom of the form
  – Step is systematically excluded if the second-level manager position is vacant

• What Doesn’t Change!
  – Ability to include overall comments about the employee’s performance
Ready to Send to Employee

• Ready to Send to Employee Step does not change!
Acknowledging the Evaluation

• What’s Different!
  – Both the manager and the employee will have a To Do task to acknowledge receipt, not just the employee

• What Doesn’t Change!
  – Managers are still responsible for verbally discussing the evaluation with the employee and for encouraging the employee to acknowledge the evaluation
  – If the manager acknowledges the evaluation on behalf of the employee, the manager will be asked to justify why they are completing on behalf of the employee
Planned Standard Reports

• Expectation/Evaluation Related
  – Performance Plan Status report
  – Below Expectations report
  – 5.0 Evaluation report

• System Reports
  – Audit Trail report
  – Proxy report
Creating New Reports

• Agency HR Users will have the ability to create and share reports
• To create an agency wide report, must use the Agency HR User role
• If creating a report as yourself, results will be limited to your reporting relationship
• The Reports Instructional Guide provides instructions for running a report
Performance Management Dashboard

• One new feature of the new Talent Management system is a Performance Management Dashboard
• The Performance Management Dashboard allows you to view the evaluations within in your agency and statewide
• The Dashboard also allows you to see graphical views of the performance evaluations for your agency (e.g., a pie chart that shows you how many employees are in each step of the process)
• To access, select the primary navigation menu, select Reports and select Dashboards (if you are not defaulted to the Dashboards tab)
How to View Evaluations Statewide

• Select the Home navigation dropdown menu and select Reports (step 1)
• Select Dashboards (if you are not defaulted to the Dashboards tab) (step 2)
• Select the filter to access filters (step 3)
• Select the report filter type of Other (step 4)
• Select the User ID filter and search for the employee using their People First User ID (step 5)
  – Only way to search for a specific employee's evaluation statewide is using the User ID search
• Select the pie chart that is presented and select the Document ID to view the evaluation (step 6)
How to View Evaluations Statewide
Continued

Step 1

- Home
- Performance Management
- Recruiting
- Org Chart
- Employee Profiles
- Reports
- Admin Center

Step 2

[Image of a navigation menu highlighting "Reports" and "Dashboards"]
How to View Evaluations Statewide
Continued

Step 3
How to View Evaluations Statewide

Continued

Step 4

Step 5
How to View Evaluations Statewide

Concluded

Step 6
Intro to HR Access

• Human resource access is very different in the new system and requires HR users to access performance plan data in a different manner
• HR access is limited to security role codes A, H and X
• Some access can only be assigned to an Agency HR User (see next slide)
• Some activities can be completed as yourself
• Some activities require you to proxy as the employee or manager (e.g., if you need to complete a step in the evaluation plan, instead skipping the step, view details of an evaluation plan)
Agency HR User Role Code

• In order to complete the following activities, you will have to proxy into the Agency HR User role (these cannot be completed as you):
  – Access/create/publish agency-wide reports (can’t run agency wide reports any other way)
HR Access as Yourself!

• Human resource users (A, H and X security role codes) are automatically assigned proxy access to all employees in their agency and to the agency HR User role (see previous slide)

• Administrator access
  – Ability to move performance evaluations through the route map (can skip one or multiple steps at one time for evaluations)
  – Ability to update the evaluation period dates for agency employees
  – Ability to assign proxy access for employees in your own agency
Intro to Administrator Access!!

• Once you log in to the new Talent Management system, you (HR users with an A, H or X security role code) will have a little setup to complete to make your life easier

• Important Note: Administrator tools are just that; they are intended to allow you to complete offline processes and are not created in a portal look and feel fashion; as such, they are not the most user-friendly tools!

• The following slides walk you through this initial setup (establishing links to) and how to use the administrator tools
Setup Admin Favorites

• Once you log in to the new Talent Management system, select the Home navigation dropdown menu and select Admin Center (step 1)
• Once in the Admin Center, select See All to access all administrator tasks that you have access to (step 2)
• To mark a task as a favorite, hover to the left of the task and select the star (to remove from a favorite select the star a second time and it’s removed from your favorites); once selected, the tasks will show in your Admin Favorites tile on your Talent Management home page (step 3)
Setup Admin Favorites Continued

• Which tasks to mark as a favorite:
  – Change Form Date – allows you to update the performance plan period dates for your agency’s employees
  – Route Form – allows you to move an evaluation to a previous or subsequent step
  – Proxy Management – allows you to assign proxy access for non-HR users in your agency (remember HR users have full proxy rights to everyone in the agency by default)
Setup Admin Favorites - Concluded

Step 1

![Home menu with Admin Center highlighted]

Step 2

![Admin Center with Tools list]

Step 3

![Company Settings and Manage Forms by User sections]

- Route Form
- Transfer Forms to New Manager
- Change Form Date
- Proxy Management
- Security Permission Reports
- Update User Information
- Proxy Import
- Set User Permissions
Changing Evaluation Plan Dates

• Select the Change Form Date link within your Admin Favorites tile (if you did not setup, go back to the slide titled “Setup Admin Favorites”) on the Talent Management home page (step 1)

• Select the radio button for the “Employee Document Folder” field, search for and select the employee and then select Search (search button is at the bottom of the screen) (step 2)

• Select the row for the performance plan to be updated (note: if the employee is a participant on multiple performance plans, requisitions, etc. you will see multiple rows) and select the Change Date button (step 3)

• Select the date to be changed (start, end or due date (or all three), select the radio button to either extend by a number of days, or change to a specific date (step 4)
Change Evaluation Plan Dates

continued

Step 1

Step 2

Step 3
Change Evaluation Plan Dates
Concluded

Step 4

Change Document Date

please pick up the date you want to re-schedule the document or just how long you want to extend the form

Change Start Date
- Extend by 0 days
- mm/dd/yyyy

Change End Date
- Extend by 0 days
- mm/dd/yyyy

Change Due Date
- Extend by 0 days
- mm/dd/yyyy

[Save] [Close]
Routing a Performance Plan

• Select the Route Form link within your Admin Favorites tile (if you did not setup, go back to the slide titled “Setup Admin Favorites”) on the Talent Management home page (step 1)
• Select the dropdown for the Search by field, select Subject User, search for and select the employee (step 2)
• Select the row for the performance plan to be updated (note: if the employee is a participant on multiple performance plans, requisitions, etc. you will see multiple rows) and select the next button (step 3)
• Select the desired option for routing the form; you can choose to move back one step, forward one step or to a specific step (options available will be dependent on what step in the Performance Plan process the employee is in) – make sure to keep the radio button for “Skip Validation” selected (step 4)
Routing a Performance Plan Continued

• Select “Move the form one step forward” to skip the current step and move the evaluation to the next step
• Select “Move the form to a specific step” and select the desired step if you need to move back or forward more than one step
• Select “Move the form one step back” to move the evaluation to the previous step
• Important Notes:
  – Skipping one or more steps will result in required fields for that step not being completed
  – Make sure to keep the radio button for “Skip Validation” selected
Routing a Performance Plan Concluded

Step 1

Step 2

Step 3

Step 4
Proxy Management

• Proxy replaces delegation
• Proxy allows for broader assignment of tasks
• HR users with a role code of A, H and X have access to create proxy assignments for agency staff (non-HR users) (remember HR users have full proxy rights to everyone in the agency by default)
• Managers have access to assign proxy access to their direct reports
Creating a Proxy Assignment

- Select the Proxy Management link in your Admin Favorites tile (if you did not setup, go back to the slide titled “Setup Admin Favorites”) on the Talent Management home page (step 1)
- Enter the person receiving proxy in the field “Who will act as the proxy (username)” and enter the person they are receiving proxy access to in the field “What account holder will the proxy act on behalf of (username)” (step 2)
- Select the checkbox beside the applicable access to grant. (step 3)
  - NOTE: Additional options show that if selected will not provide access since they are not used
  - Select Performance Expectations, Performance Manager Forms and Performance Management Tab (must check all three) to provide access to Performance Management and select Options to limit access to a specific plan year
- Important Note: As proxy assignments are not date driven, you must remove the proxy assignments manually
Creating a Proxy Assignment

Concluded

Step 1

Step 2

Proxy Management

Make Assignments

Grant Proxy:
Who will act as the proxy(username)?
What account holder will the proxy act on behalf of (username)?

Find User...

Find User...

Step 3

Grant Proxy Rights:
Grant rights to the following modules/tabs:

- Performance Expectations
- Performance Manager Forms

Options...

- Admin Tool
- Directory
- Reports/Dashboards
- Recruiting
- Organization chart
- Home Page Tab
- Options
- Employee Profile

Save

Saving will grant proxy access as per above criteria selection.
How to Access Proxy Access

• In the top right corner, select your name, then select Proxy (step 1)
• Search for the user to proxy as by entering their first or last name (or both), select the users name once it appears and selecting Ok (step 2)
  – If going into the proxy for the Agency HR User, search for your agency acronym (e.g., the Department of Management Services is DMS HR User)
• Once you select the users name, a proxy session will load and you have officially assumed rights as that person (step 3)
• To end your proxy session, select your name in top right corner and select Become Self
• Important Note: You can only proxy as one person at a time. If you proxy as one employee, then proxy as a different person, your first proxy session is automatically terminated
How to Access Proxy Concluded

Step 1

Step 2

Step 3

JIMMY J COX (00223293) on behalf of DMS HRUser (HR_DMS)
The End