



CLERK & COMPTROLLER PALM BEACH COUNTY

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ePerformance Leaders User Guide

Performance Check-in

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Leaders Guide – Performance Check-in

A Performance Check-in may be used during an employee’s introductory period to indicate which competencies have been assessed and meet expectations and which competencies may not have been assessed yet or need to continue to be assessed. This document does not need to be completed for employees you wish to remove from introductory status at 90 days.

1. Generate Check-in

Login to PeopleSoft and go to the Manager Self Service menu. Click the **Team Performance** tile.



Select the checkbox next to the employee that you want to create the document for. Click **Continue**.



Enter the data below:

Period Begin Date (normally the Date of Hire)

Period End Date (90 days after the Date of Hire)

Document Type (select **Performance Check-in** from the dropdown menu)

Template ID (select **Performance Check-in** from the dropdown menu)

Create Performance Documents

Complete the information in the Document Creation Details section below, then select Create Documents to generate documents for the employee(s) you previously selected.

Document Creation Details

Period Begin Date: 10/02/2017 | Period End Date: 12/31/2017

Document Type: Performance Check-in

Clone from Prior Document: No

Template: Performance Check-in

Create Documents

Selected Employees

Employee ID	Last Name	First Name
00000025481	Clerk	John

Click on **Current Documents**.

Create Performance Documents - Results

Below are the results for the employees you selected.

Selected Employees

Employee ID	Name	Template	Successful Creation?	Status
00000025481	John Clerk	Performance Check-in	Yes	Document created successfully

Go To: [Create Documents](#) | [Current Documents](#)

2. Begin Evaluation

Locate the desired document type for the employee. Click on the employee's **Name**.

Current Performance Documents

Listed are the current performance documents for which you are the Manager.

Filter Criteria

Performance Documents

Name	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date
John Clerk	Performance Check-in	Evaluation in Progress	10/02/2017	12/31/2017	Court Specialist II	12/31/2017

3. Rate Competencies

The review is displayed. Click on the **Expand All** button to see all of the individual Competency sections of the review.

Performance Check-in
Evaluation - Update and Submit
John Clerk

Actions

Job Title: Court Specialist II
Document Type: Performance Check-in
Template: Performance Check-in
Status: Evaluation in Progress

Manager: Jane Manager-Smith
Period: 10/22/2017 - 12/31/2017
Document ID: 8820
Due Date: 12/31/2017

Enter ratings and comments for each section of this evaluation, if applicable. Save entries made on the evaluation by selecting the Save button.

Expand All | Collapse All | Check Language | Calculate All Ratings | Cancel Evaluation

Section 1 - Competencies

Enter ratings and comments for each competency and behavior listed below, if applicable.

Expand | Collapse

- Competency 1: Effective & Efficient
- Competency 2: Great Place to Work
- Competency 3: Outstanding Service

Competencies Summary

Manager Rating

Each Competency has two ratings: **Assessed** and **Continue Assessment**.

Click on the dropdown menu in every section to make a selection.

Section 1 - Competencies

Enter ratings and comments for each competency and behavior listed below, if applicable.

Expand | Collapse

Competency 1: Effective & Efficient

Behavior

Behavior 1: Productivity, Quality, & Time Management
Meets productivity goals; produces accurate and timely work; prioritizes work effectively; quickly adapts when a change is made.

Behavior 2: Job Knowledge
Possesses the necessary knowledge, skills and ability; participates in training; monitors trends and follows best practices.

Behavior 3: Integrity
Displays sound, objective judgment; honest; elevates issues appropriately.

Behavior 4: Innovation
Displays originality and contributes innovative ideas; suggests ways to complete work more efficiently; promotes the use of technology to streamline or automate processes.

Manager Rating: Assessed | Continue Assessment

To review the Rating Descriptions click on the yellow **Notepad** icon.

Proficiencies	
Rating	Description
<input type="radio"/> Assessed	Assessed - performance consistently meets established standards - employee requires little direction from supervisor - competency behaviors have been demonstrated in a satisfactory manner
<input type="radio"/> Continue Assessment	Continue Assessment - work may be completed at an acceptable level - more time is needed to determine progress on key competency behaviors

Select Proficiency

[Return](#)

Click **Return** to return to the previous page.

Proficiencies	
Rating	Description
<input type="radio"/> Assessed	Assessed - performance consistently meets established standards - employee requires little direction from supervisor - competency behaviors have been demonstrated in a satisfactory manner
<input type="radio"/> Continue Assessment	Continue Assessment - work may be completed at an acceptable level - more time is needed to determine progress on key competency behaviors


Select Proficiency

[Return](#)

4. Calculate Competencies Summary Rating


Click on the **Calculator** icon to reveal the Summary Rating.

Competencies Summary	
Manager Rating	Continue Assessment

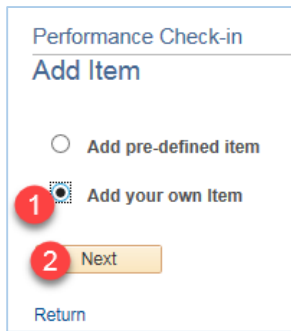


5. Add Employee Future Goals

Click on the **Add Item** link to add goals.

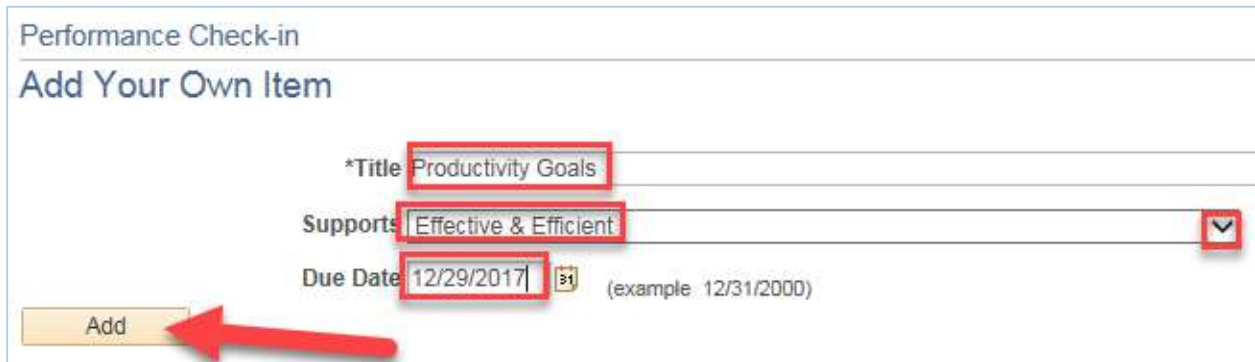
▼ Section 2 - Employee Future Goals
 Add Item

Click on the **Add Your Own Item** radio button. Click on the **Next** button to continue.

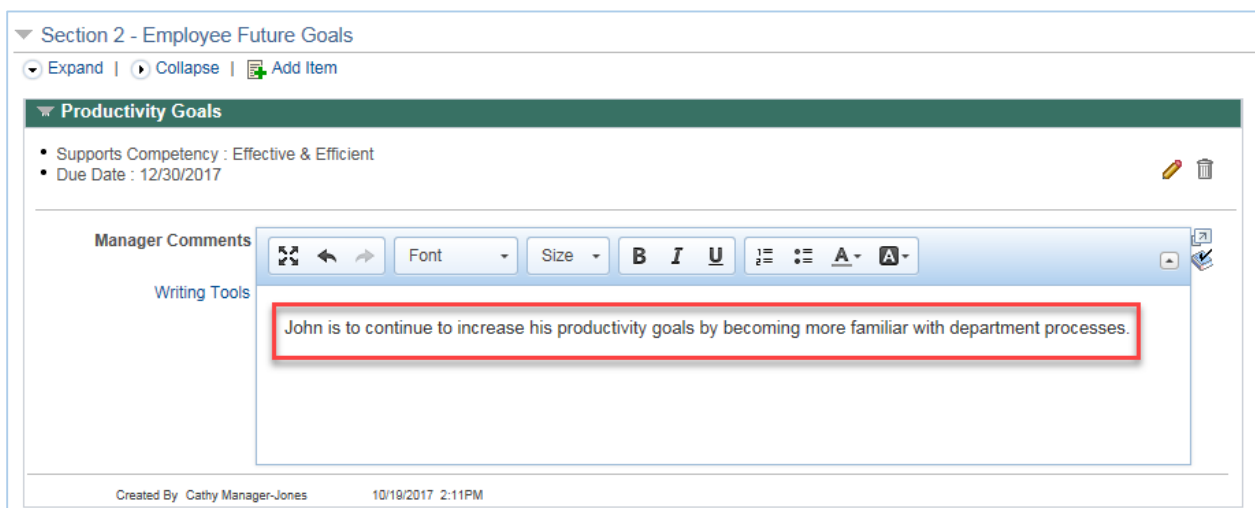


Enter the **Title** of the goal, select the Competency that it **supports** from the dropdown menu, and enter a **Due Date**.

Click the **Add** button to continue.



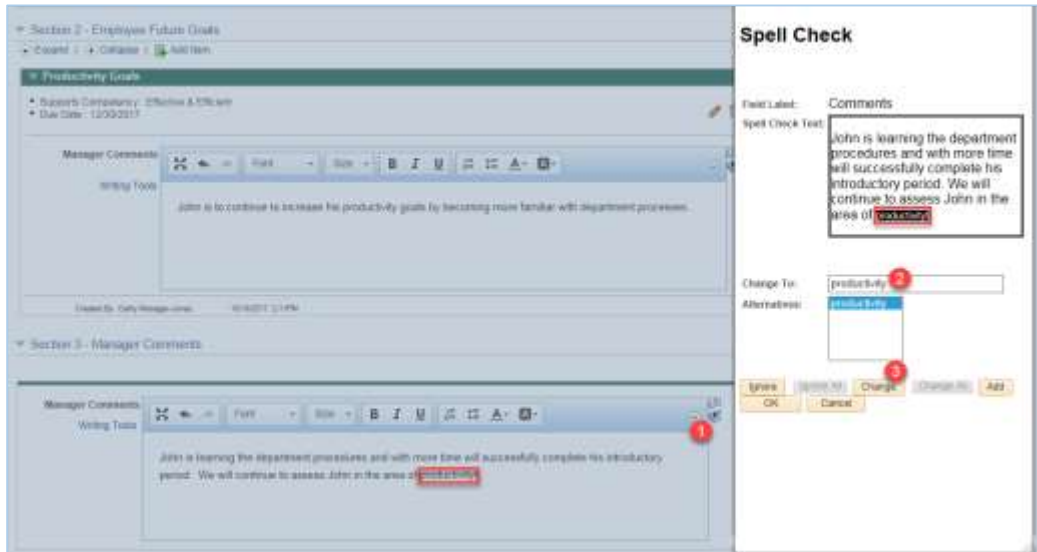
In the **Comments** section, describe the goal using the SMART method (Specific, Measurable, Attainable, Relevant, and Time-bound).



6. Add Manager Comments & Check Language

In the **Manager Comments** section, please indicate the areas the employee will need further assessment on, as well as any other comments.

Please note that there are editing tools to assist you. Below is an example of the Spell Check tool.

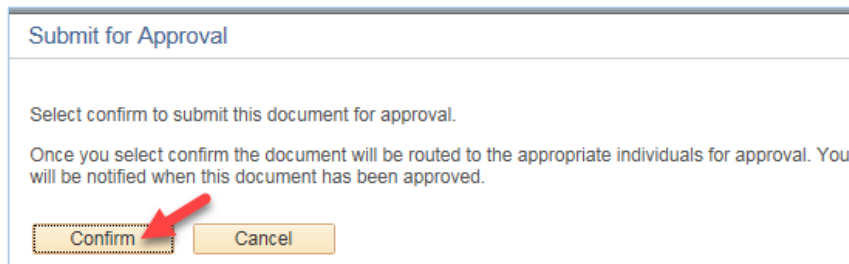


7. Save and Submit for Approval

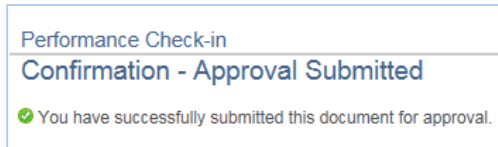
Click the **Save** button, then click the **Submit for Approval** button. This will generate an email to your One-Up Manager informing them that there is a review that requires their approval.



A confirmation message will appear. Click the **Confirm** button to submit the review for approval.



A second confirmation message will be displayed.



8. Review the Document Status

You can review the status of the review at any time by clicking on the Current Documents section. When your manager has approved the review you will receive an email. The status of the review will change from **Approval – Submitted** to **Approval – Approved**.

Current Performance Documents
Listed are the current performance documents for which you are the Manager.

Filter Criteria

Performance Documents			Personalize	Find	Print	First	1 of 1	Last
Name	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date		
John Clark	Performance Check-in	Approval - Submitted	10/02/2017	12/31/2017	Court Specialist II	12/31/2017		

One-Up Approval

1. Access the Check-in

Login to PeopleSoft and go to the Manager Self Service menu from ClerkNet or from home using www.mypalmbeachclerk.com. Click the **My Team Performance** tile.

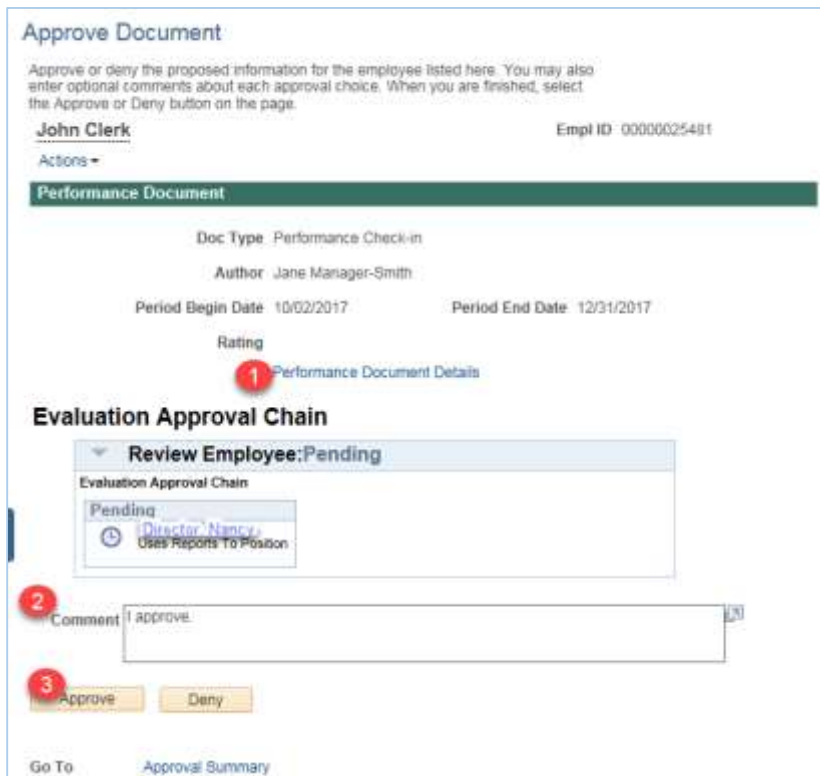


Click on the **Approve Documents** section. Locate the review that you want to approve. Click the employee **Name** link.



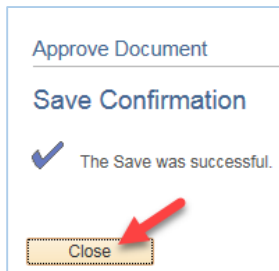
2. Approve or Deny the Check-in

Click on Performance Document Details to open the Performance Check-in. Enter any comments in the **Comment** box. Then click **Approve** or **Deny**.

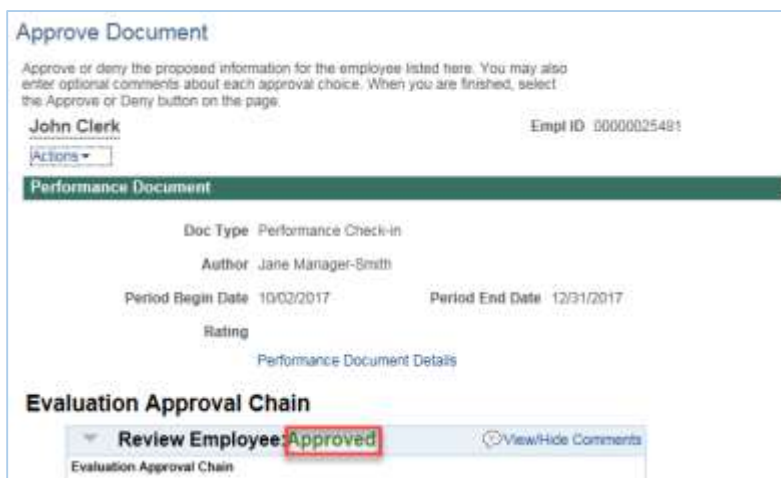


Note: The evaluator can see the comments but the employee cannot see the comments.

A confirmation message will be displayed. Click **Close**.



The **Approve Document** page will be displayed.



Release Check-in

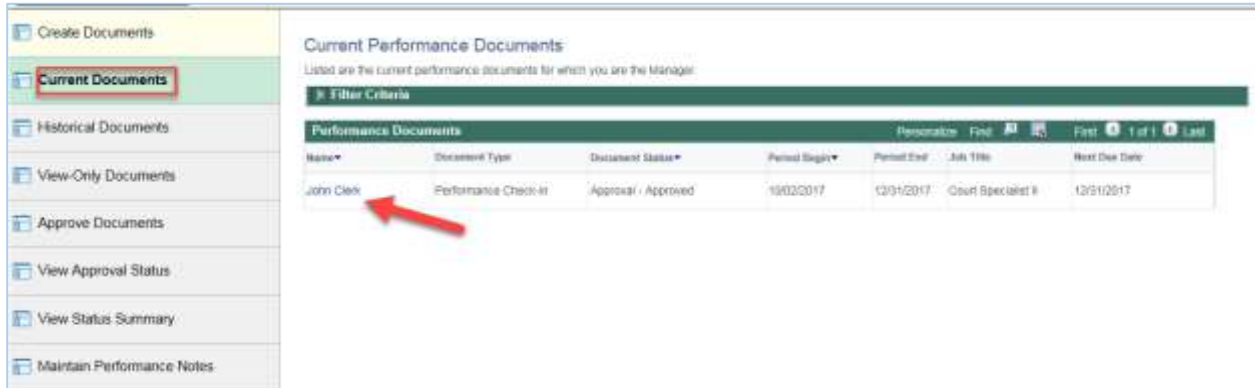
1. Print the Check-in

Prior to meeting with the employee, print a copy of the Performance Check-in for them.

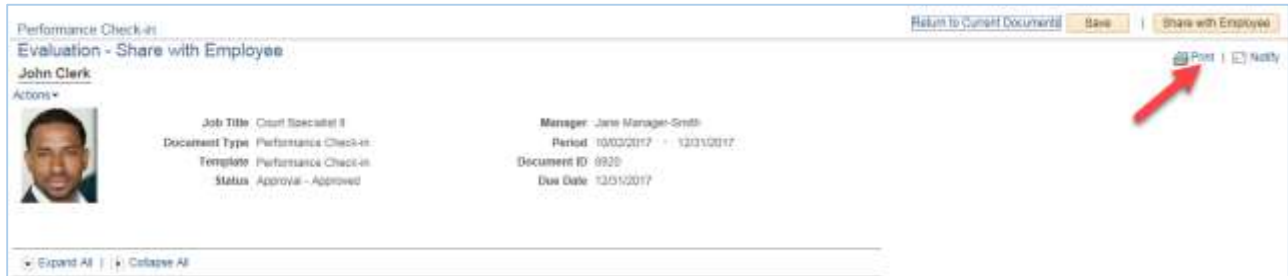
Login to PeopleSoft and go to the Manager Self Service menu. Click the **Team Performance** tile.



Click on Current Documents. Locate the document that has been approved. The status will be **Approval - Approved**. Click on the **employee's** name.



Click the **Printer** icon.



Click on the **Printer** icon again.

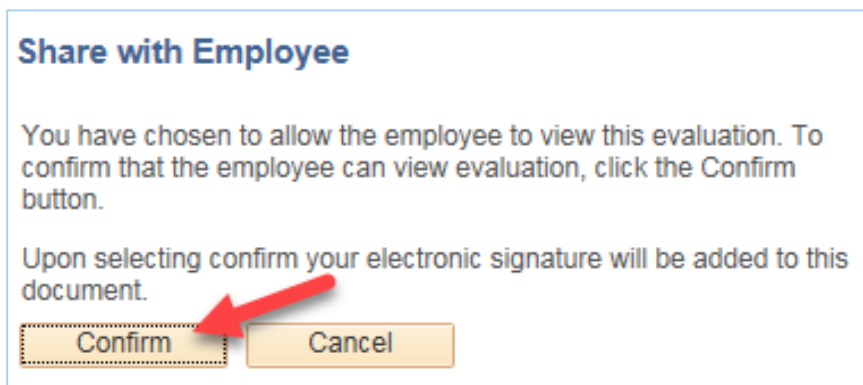


2. Release the Check-in

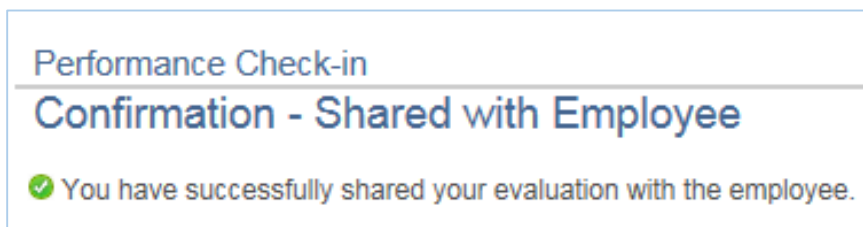
Conduct a one-on-one meeting with the employee. After the meeting, share the review electronically with the employee. Click the **Share with Employee** button.



A confirmation message will be displayed. Click the **Confirm** button.



A second confirmation message will appear.



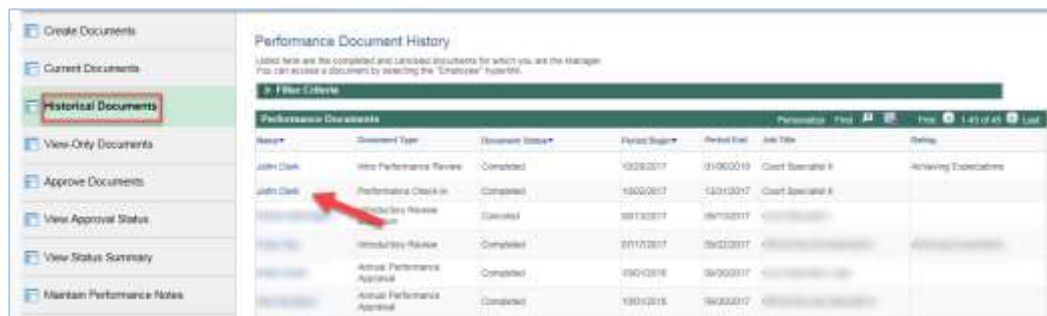
Complete Check-in

1. View Employee Comments

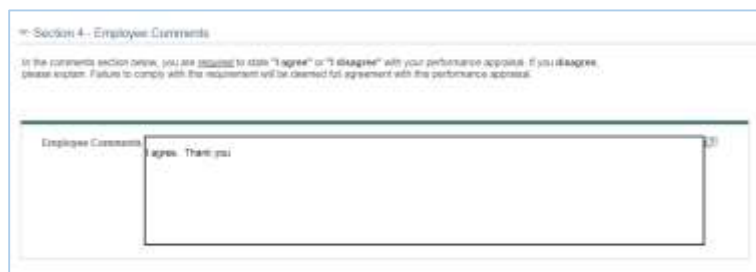
Login to PeopleSoft and go to the Manager Self Service menu. Click the **Team Performance** tile.



Click on **Historical Documents**. Click on the **employee name** of the performance document to review.



Scroll to the bottom of the document to view the **Employee Comments**.



2. Reopen the Check-in

If you need to update your comments or change any of the ratings, please contact HRIS to reopen the review or extension. Note that just like all performance documents, if the Performance Check-in is reopened, the document will need to go through the approval process again.

Performance Notes (Not Required)

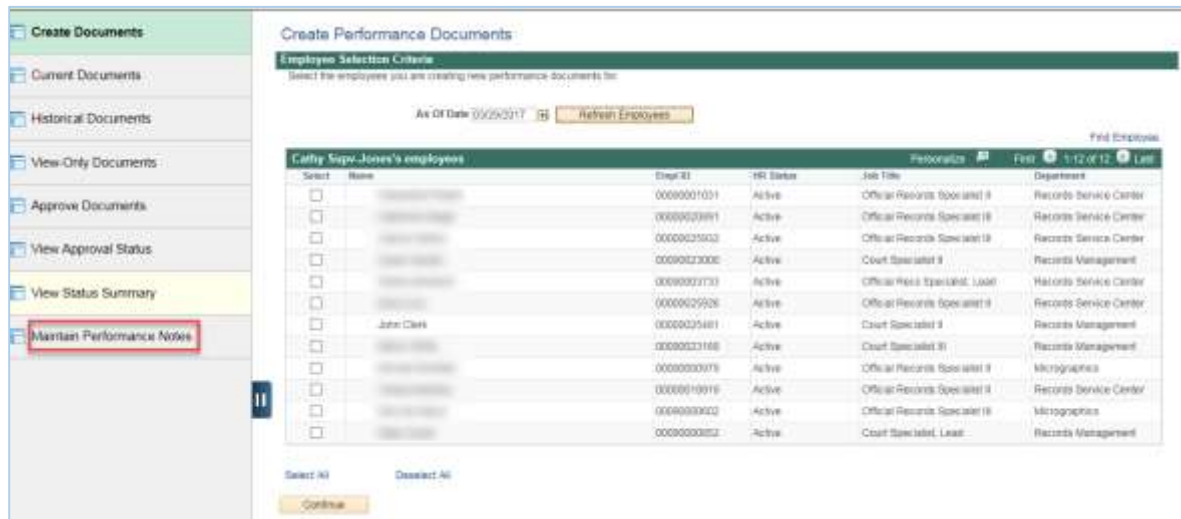
1. Enter Performance Notes

Login to PeopleSoft and go to the Manager Self Service menu. Click the **Team Performance** tile.

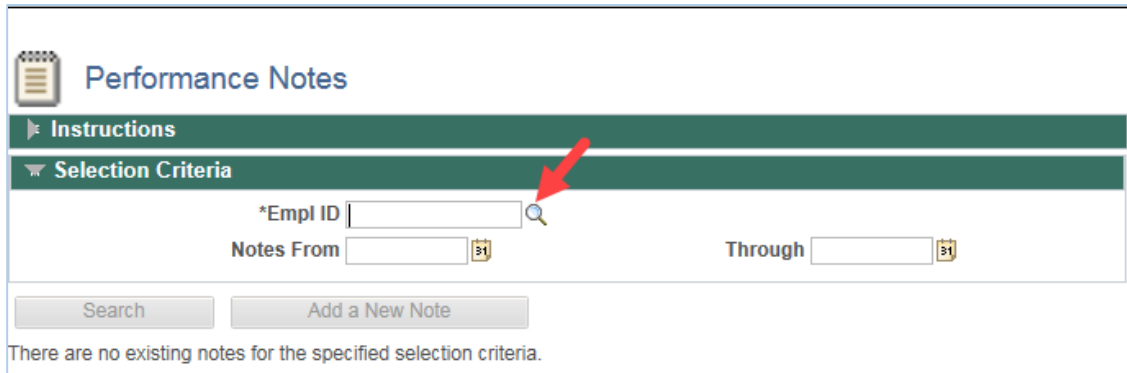
Performance notes may be entered at any time throughout the year. Performance notes cannot be loaded in to a performance document.



Click on **Maintain Performance Notes**.

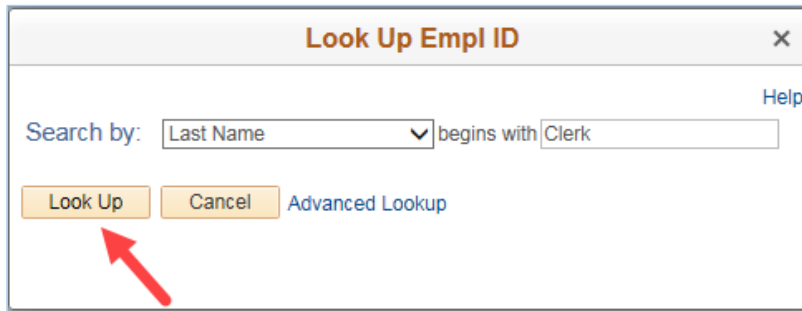


Click on the **Magnifying Glass**.



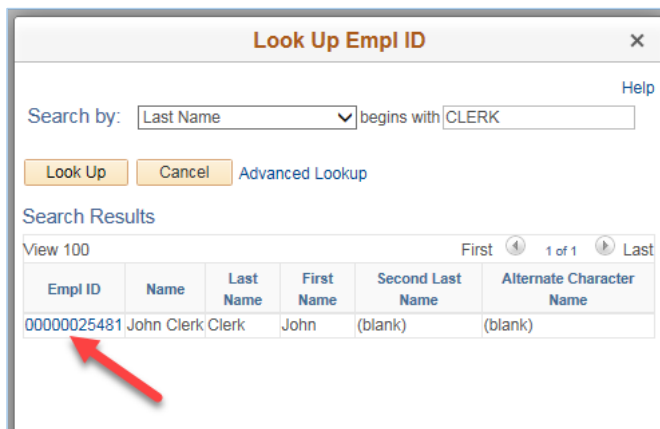
The screenshot shows the 'Performance Notes' search interface. It includes a search bar with a magnifying glass icon, a 'Notes From' date field, and a 'Through' date field. Below the search bar are 'Search' and 'Add a New Note' buttons. A red arrow points to the magnifying glass icon. Below the search bar, the text reads: 'There are no existing notes for the specified selection criteria.'

Choose Last Name in the **Search by** dropdown menu. Enter the employee's Last Name and click on **Look Up**.



The screenshot shows the 'Look Up Empl ID' dialog box. The 'Search by' dropdown is set to 'Last Name' and the search criteria is 'begins with Clerk'. There are 'Look Up', 'Cancel', and 'Advanced Lookup' buttons. A red arrow points to the 'Look Up' button.

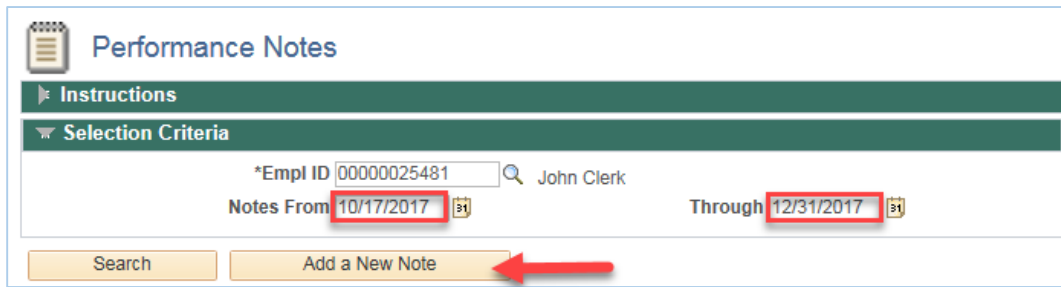
Click on the **Empl ID** for the employee.



The screenshot shows the 'Look Up Empl ID' dialog box with search results. The search criteria is 'Last Name' and 'begins with CLERK'. The search results table is displayed below the search bar. A red arrow points to the 'Empl ID' '00000025481' in the first row of the table.

Empl ID	Name	Last Name	First Name	Second Last Name	Alternate Character Name
00000025481	John Clerk	Clerk	John	(blank)	(blank)

Enter the **Notes From** and **Through** fields. Click on the **Add a New Note**.



The screenshot shows the 'Performance Notes' interface. At the top, there is a header with a calendar icon and the text 'Performance Notes'. Below this is a green bar with 'Instructions' and another green bar with 'Selection Criteria'. Under 'Selection Criteria', there is a search bar containing '*Empl ID 00000025481' and a magnifying glass icon, followed by the text 'John Clerk'. Below the search bar, there are two date fields: 'Notes From 10/17/2017' and 'Through 12/31/2017', both with calendar icons. At the bottom, there are two buttons: 'Search' and 'Add a New Note'. A red arrow points to the 'Add a New Note' button.

Enter the **Subject** for the Performance Note. Enter the **Note Text**. Click **Save**.



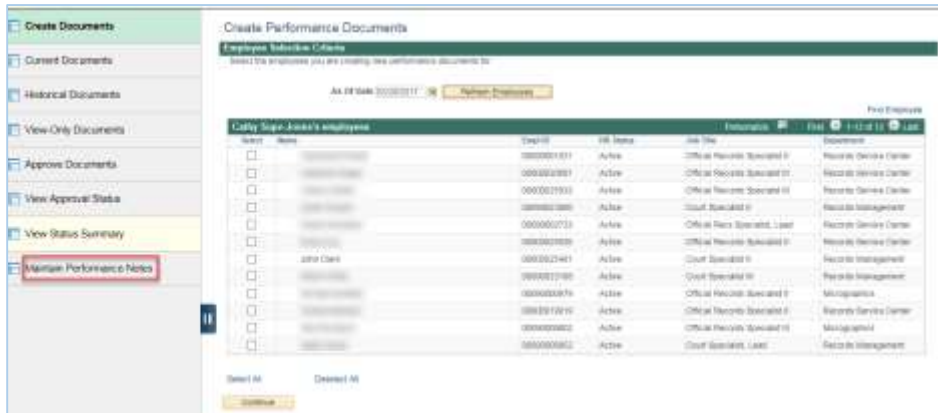
The screenshot shows the 'Performance Notes - Add/Update Notes' form. At the top, there is a header with a calendar icon and the text 'Performance Notes - Add/Update Notes'. Below this is a green bar with 'Instructions' and another green bar with 'Selected Performance Note'. Under 'Selected Performance Note', there is a table with columns: 'Empl ID', 'Empl Name', 'Created', 'Created By', 'Last Update', and 'Updated By'. Below the table, there is a 'Subject' field containing 'On-Street EOC Advanced Training' and a 'Note Text' field containing 'Completed to complete the On-Street EOC Advanced Training prior to January 1, 2018'. At the bottom, there is a 'Save' button. A red arrow points to the 'Save' button.

2. Search for Performance Notes

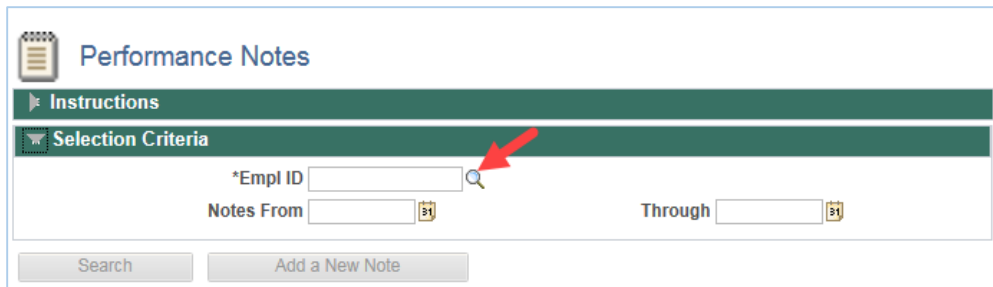
Login to PeopleSoft and go to the Manager Self Service menu. Click the **Team Performance** tile.



Click on **Maintain Performance Notes**.



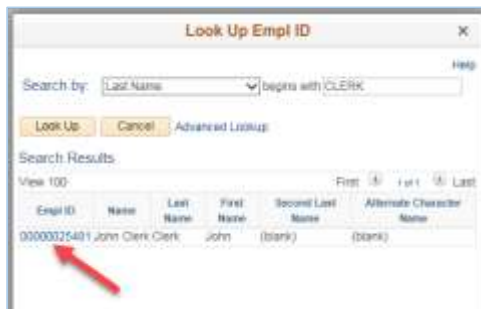
Click on the **Magnifying Glass**.



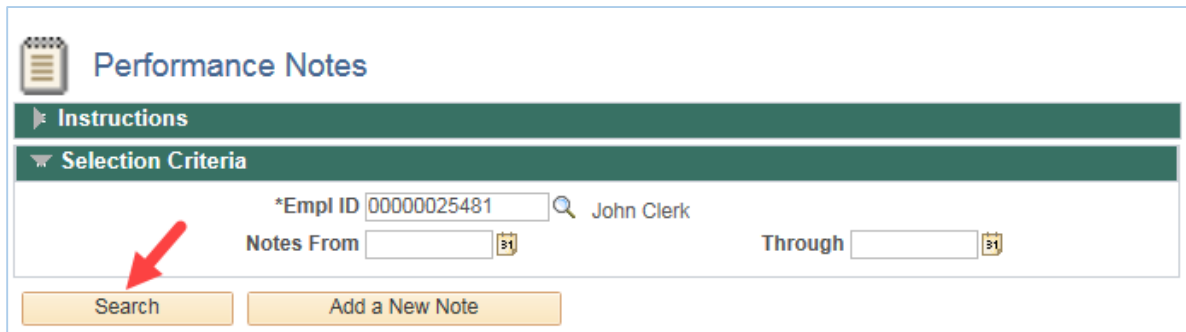
Enter the employee's Last Name and click **Look Up**.



Click on the **Empl ID** for the employee.

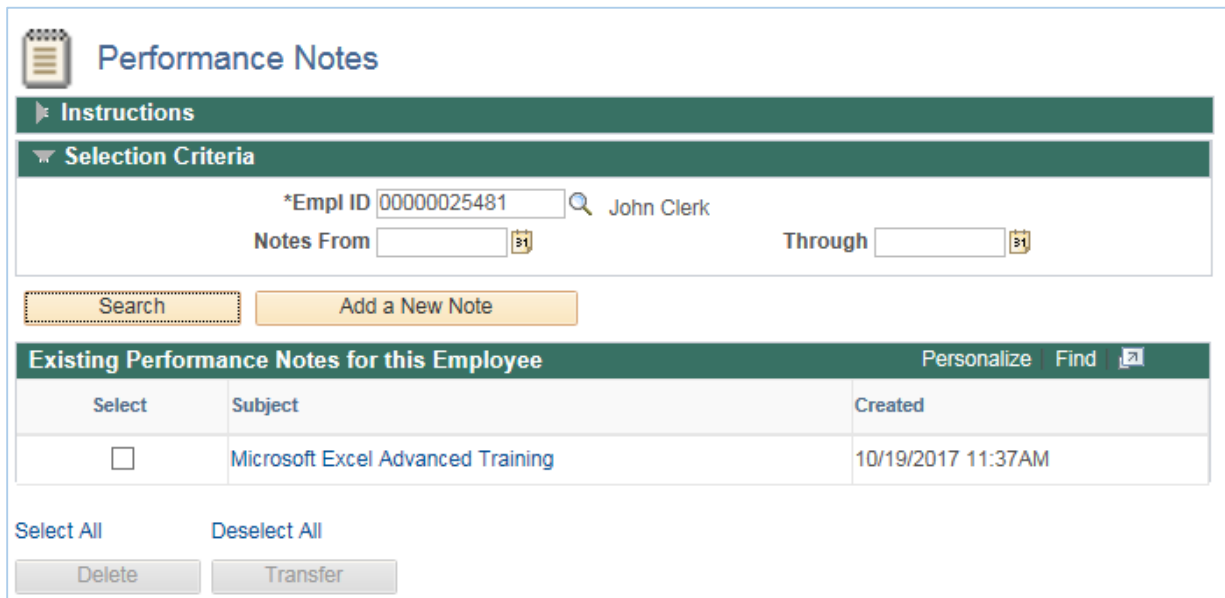


Click **Search**.



The screenshot shows the 'Performance Notes' search interface. At the top, there is a header with a notebook icon and the text 'Performance Notes'. Below this are two expandable sections: 'Instructions' and 'Selection Criteria'. The 'Selection Criteria' section contains a search form with the following fields: '*Empl ID' with the value '00000025481', a magnifying glass icon, and the text 'John Clerk'. Below this are 'Notes From' and 'Through' date pickers. At the bottom of the form are two buttons: 'Search' and 'Add a New Note'. A red arrow points to the 'Search' button.

The performance notes for the employee will be displayed. Click on the **Subject** hyperlink to review the note.

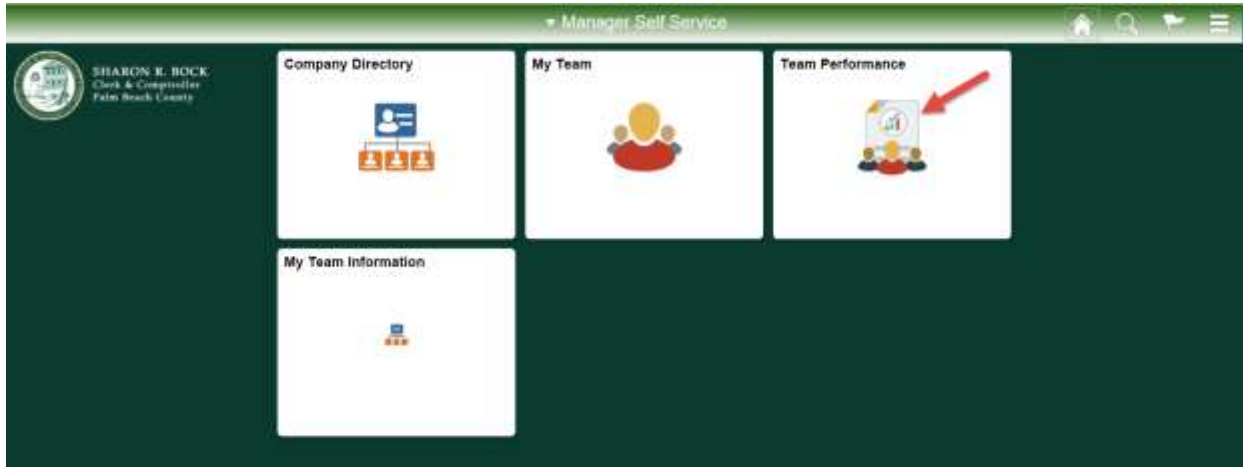


The screenshot shows the 'Performance Notes' results interface. It features the same header and search criteria as the previous screenshot. Below the search criteria are two buttons: 'Search' (highlighted with a dashed border) and 'Add a New Note'. Below the buttons is a table titled 'Existing Performance Notes for this Employee' with columns 'Select', 'Subject', and 'Created'. The table contains one row with a checkbox in the 'Select' column, the subject 'Microsoft Excel Advanced Training', and the creation date '10/19/2017 11:37AM'. At the bottom of the interface are buttons for 'Select All', 'Deselect All', 'Delete', and 'Transfer'.

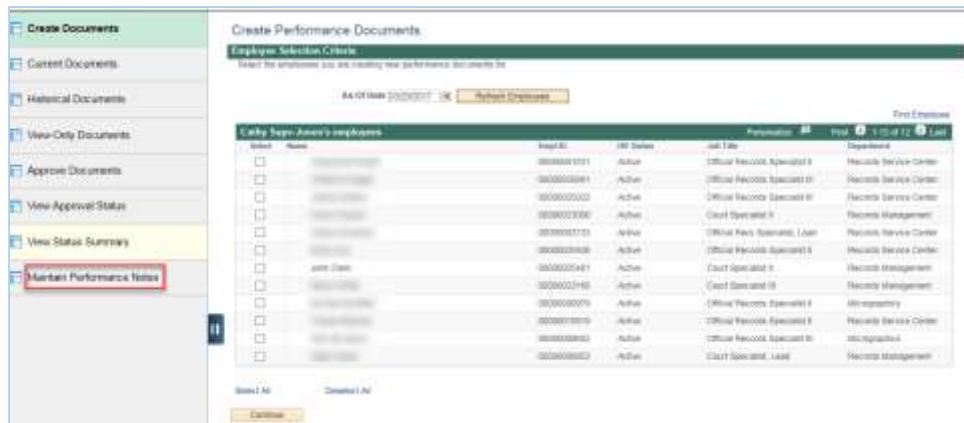
Select	Subject	Created
<input type="checkbox"/>	Microsoft Excel Advanced Training	10/19/2017 11:37AM

3. Edit Performance Notes

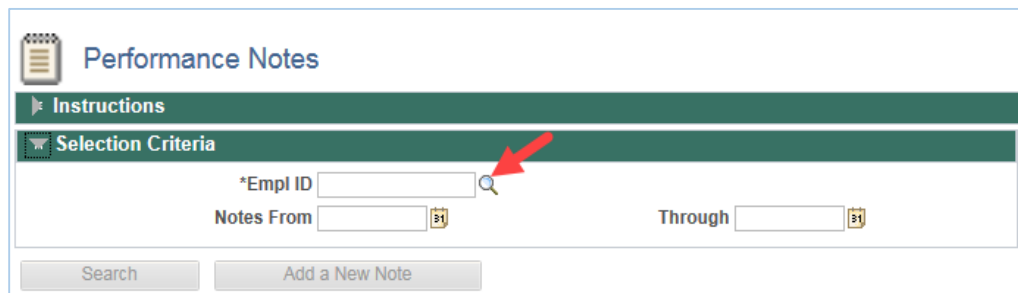
Login to PeopleSoft and go to the Manager Self Service menu. Click the **Team Performance** tile.



Click on **Maintain Performance Notes**.



Click on the **Magnifying Glass**.



Enter the employee's Last Name and click **Look Up**.

Look Up Empl ID [X]

Search by: Last Name [v] begins with Clerk

Look Up Cancel Advanced Lookup

Click on the **Empl ID** for the employee.

Look Up Empl ID [X]

Search by: Last Name [v] begins with CLERK

Look Up Cancel Advanced Lookup

Search Results

View 100 First 1 of 1 Last

Empl ID	Name	Last Name	First Name	Second Last Name	Alternate Character Name
00000025481	John Clerk Clerk	John	(blank)	(blank)	(blank)

Click **Search**.

Performance Notes

Instructions

Selection Criteria

*Empl ID 00000025481 John Clerk

Notes From Through

Search Add a New Note

Click on the **Subject** hyperlink to edit the note.

Performance Notes

Instructions

Selection Criteria

*Empl ID 0000025481 John Clerk

Notes From [] Through []

Search Add a New Note

Existing Performance Notes for this Employee Personalize Find

Select	Subject	Created
<input type="checkbox"/>	Microsoft Excel Advanced Training	10/19/2017 11:37AM

Select All Deselect All

Delete Transfer

Edit the **Subject** or **Note Text**. Click **Save**.

Performance Notes - Add/Update Notes

Instructions

Selected Performance Note

Applications

Empl ID: 0000025481 John Clerk Created: 10/19/2017 11:37AM
Creator: Cathy Manager-Jones
Last Update: Updated By:

Subject: Microsoft Excel Advanced Training

Note Text: Employee to complete the Microsoft Excel Advanced Training prior to January 1, 2018. Employee has attended the October 18th training session.

Save

Note: Performance notes do not load into performance documents. If using this feature, copy and paste your notes to include them in a performance document.