

Performance Management Training for Employees

Performance Management for Employees



Welcome to
CAPPS HR/PAYROLL
End-User Training (EUT)
Agency Performance Management
Course Number: 190

Course Name: Performance Management for Employees

This course does NOT contain audio.



Recommended Users: Employees

Centralized Accounting and Payroll/Personnel System

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Welcome

Performance Management for Employees

Welcome




Centralized Accounting and Payroll/Personnel System

Hello,

Welcome to the CAPPS HR/Payroll
Performance Management
for Employees (190)
training course.

Before taking this class you should have
already completed the
99-CAPPS Fundamentals and
100-Employee Self-Service courses.



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Performance Management Training for Employees

Greetings

Performance Management for Employees

Greetings

Centralized Accounting and Payroll/Personnel System



*Before we get started,
let's go over some
housekeeping rules,
along with a few pointers
and tips that will help you
complete this course.*

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Housekeeping Rules

Performance Management for Employees

Housekeeping Rules

Centralized Accounting and Payroll/Personnel System

- Training Materials
- Restrooms
- Emergency Exits
- Please Silence Cell Phones
- Ask Questions



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Performance Management Training for Employees

Introductions

Performance Management for Employees


Introductions

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Before proceeding with the course, let's take some time to get to know each other.

Tell us:

- Your Name
- Your Agency and Department
- Your expectations from this session
- An interesting fact about yourself



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Course Duration

Performance Management for Employees

Course Duration

capps



2 Hours

You can take the training how it best fits in your schedule.

Select next to continue

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Performance Management Training for Employees

Course Preparation

Performance Management for Employees

Course Preparation



Avoid Distractions

Select next to continue

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Course Outline

Performance Management for Employees


Course Outline



Centralized Accounting and Payroll/Personnel System

The CAPPS Performance Management training is organized in four sections. Throughout each section you will learn how to use CAPPS Performance Management functionality. The four sections are:

- **Section 1** – Overview
- **Section 2** – The Performance Process and Roles
- **Section 3** – Employee Performance Management Activities
- **Section 4** – Review



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Performance Management Training for Employees

Course Objectives

Performance Management for Employees

Course Objectives

Centralized Accounting and Payroll/Personnel System

After completing this course you will be able to:

- Define terms used within the Performance Management module
- Describe the Performance Management Process and Roles
- Perform Employee Performance Management Activities

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Section 1 – Performance Management Overview

Performance Management for Employees



Section 1
*Performance
Management Overview*

Centralized Accounting and Payroll/Personnel System

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Performance Management Training for Employees

Section 1 - Objectives


Performance Management for Employees

Section 1 – Objectives

Centralized Accounting and Payroll/Personnel System

After completing this section you will be able to:

- Describe the CAPPS Performance Management process
- Define Key Roles and Responsibilities / Key Terms



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Section 1 - Outline

Performance Management for Employees

Section 1 – Outline

Centralized Accounting and Payroll/Personnel System

1	CAPPS Performance Management Overview	10 min
2	Roles and Responsibilities / Key Terms	10 min

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Performance Management Training for Employees

Section 1 – Lesson 1

CAPPS Performance Management Overview

Performance Management for Employees

Section 1, Lesson 1

Centralized Accounting and Payroll/Personnel System

1 CAPPS Performance Management Overview 10 min

What is CAPPS Performance Management?

2 Roles and Responsibilities / Key Terms 10 min

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Performance Management for Employees

Section 1, Lesson 1

Centralized Accounting and Payroll/Personnel System

What is CAPPS Performance Management?

- CAPPS Performance Management is an integrated module within CAPPS/HR Payroll that provides a self-service evaluation management application for managers, employees, and human resources (HR) administrators.
- It can be used as a tool for planning, collaboration, communication, assessment, and monitoring evaluations.
- CAPPS Performance Management supports the entire planning and evaluation process from planning and aligning employee performance goals through assessment and rewarding employee performance results within the right behaviors.

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Performance Management Training for Employees

Performance Management for Employees

Section 1, Lesson 1

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Performance Management allows Employees to:

- View current evaluation from your Manager
- Complete a Self-Evaluation
- Acknowledge Final Evaluation
- View Historical Evaluations
- Participate as a Nominee

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Performance Management for Employees

Section 1, Lesson 1

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Performance Management - Pre-Defined Goals

Managers are able to select Goals from a pre-defined list and are able to add their own goals.

Add a Pre-Defined Goal

To search for Goals to add to the document select the search button. You can also enter search criteria to help refine your results.

Search Criteria

Goal:

Search Results Personalize | 1/1 1-8 of 8

Goals	Item Details
<input type="checkbox"/> Increase customer satisfaction by 10%	10%
<input type="checkbox"/> Increase Cash Reserves	10%
<input type="checkbox"/> Cut operational expenses by 2%	10%
<input type="checkbox"/> Reduce Customer Complaints by 5%	10%
<input type="checkbox"/> Decrease Call Center Response Time by 2 minutes	10%
<input type="checkbox"/> Obtain additional education	10%
<input type="checkbox"/> Automate business process	10%
<input type="checkbox"/> Obtain a healthy working environment	10%

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Performance Management Training for Employees

Performance Management for Employees

Section 1, Lesson 1

Centralized Accounting and Payroll/Personnel System

Performance Management - Pre-Defined Competencies

Managers are also able to select Competencies from a pre-defined list and are able to add their own competencies.

Add a Pre-Defined Competency

To search for Competencies to add to the document select the search button. You can also enter search criteria to help refine your results.

Search Criteria

Competency: _____

Search **Clear**

Search Results Personalize | 1-14 of 14

Competencies	Item Details
<input type="checkbox"/> Communication	11
<input type="checkbox"/> Customer Service	11
<input type="checkbox"/> Leadership - Manager/Executive	11
<input type="checkbox"/> Leadership - Employee	11
<input type="checkbox"/> Leadership - Team Lead	11
<input type="checkbox"/> Leadership - Team Lead	11
<input type="checkbox"/> Leadership - Employee	11
<input type="checkbox"/> Privacy and Information Security	11
<input type="checkbox"/> Problem Solving	11
<input type="checkbox"/> Professional Conduct and Development	11

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Performance Management for Employees

Section 1, Lesson 1

Centralized Accounting and Payroll/Personnel System

Performance Management - Career Development

Managers can describe what the employee needs to do within the year in regards to their career.

Add Your Own Item

*Title (What does the EE needs to do within the year for career?)

Description

Font Size B I U

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Performance Management Training for Employees

Section 1 – Lesson 2

Roles and Responsibilities / Key Terms

Performance Management for Employees

Section 1, Lesson 2

1 CAPPS Performance Management Overview 10 min

2 Roles and Responsibilities / Key Terms 10 min

- Review Key Roles and Responsibilities
- Review Key Terms

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Roles

Performance Management for Employees

Section 1, Lesson 2

Roles	Responsibility
Employee	Employees will review checkpoint feedback (if applicable), complete self-evaluation, review and acknowledge the employee final evaluation.
Manager	
Administrator	
Participant (Nominee)	Employees may be asked to serve as participants.

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Performance Management for Employees

Section 1, Lesson 2

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Roles	Responsibility
Employee	
Manager	Managers will create documents, define and finalize criteria, nominate participants, complete performance evaluations with ratings and comments.
Administrator	
Participant (Nominee)	Managers will also be able to reopen, cancel, delete, and request transfer performance documents to other Managers.

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Performance Management for Employees

Section 1, Lesson 2

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Roles	Responsibility
Employee	
Manager	
Administrator	Administrators can create reopen, cancel, delete, and transfer documents to Managers.
Participant (Nominee)	

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Performance Management Training for Employees

Performance Management for Employees

Section 1, Lesson 2

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Roles	Responsibility
Employee	Participants are individuals that have been asked to participate in an employee's 360 evaluation.
Manager	
Administrator	
Participant (Nominee) →	These could be peers or other managers that are not a "Reports To" manager of the employee.

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Key Terms

Performance Management for Employees

Section 1, Lesson 2 Continued

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Key Terms	Definitions
Activity Guide	The Activity Guide allows users to see where they are in the evaluation process.
Audit History	This maintains a user name, date, and time stamp for steps along the process.
Workflow Email	These are automated emails setup to be sent upon certain actions within the system.

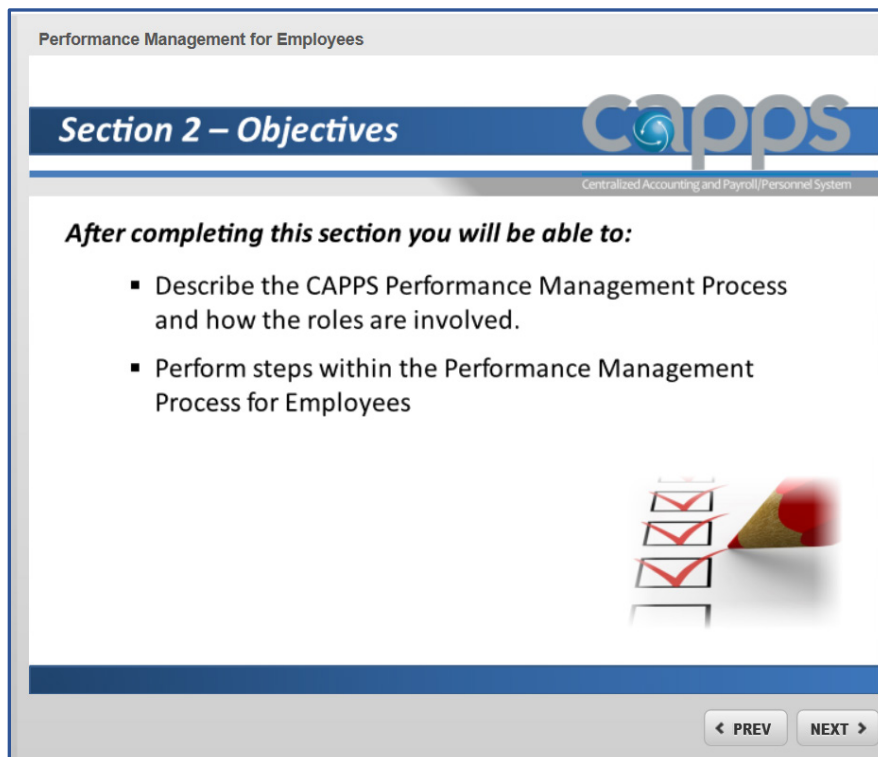
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Performance Management Training for Employees

Section 2 – The Performance Management Process



Section 2 - Objectives



Performance Management Training for Employees

Section 2 - Outline

Performance Management for Employees

Section 2 – Outline

Centralized Accounting and Payroll/Personnel System

1	Performance Management Process and Roles	10 min
2	Employee Performance Management Process Steps	60 min

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Section 2, Lesson 1 – Performance Management Process and Roles

Performance Management for Employees

Section 2, Lesson 1

Centralized Accounting and Payroll/Personnel System

1	Performance Management Process <ul style="list-style-type: none">• Describes the Performance Management process and how each role is involved.	10 min
2	Manager Performance Management Process Steps	60 min

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Performance Management Training for Employees

Performance Management for Employees

Section 2, Lesson 1

The Performance Management Process



EMPLOYEE **MANAGER** **2nd LEVEL MGR**

Select a role to learn the associated responsibilities
in the Performance Management Process

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Menu Performance Management for Employees

Introduction
Section 1 - Overview
Section 2 - Performance Management Process
Section 2, L2 - Employee Process Steps
Section 3 - Review

Role: Employee

BETH

Responsibilities:

- Reviews checkpoint feedback, if applicable
- Completes an employee self-evaluation
- Reviews the performance evaluation completed by the manager
- Meets with the manager during the performance management process
- Acknowledges the employee performance evaluation
- Views/prints the performance evaluation
- Accepts or denies participant/nominee requests

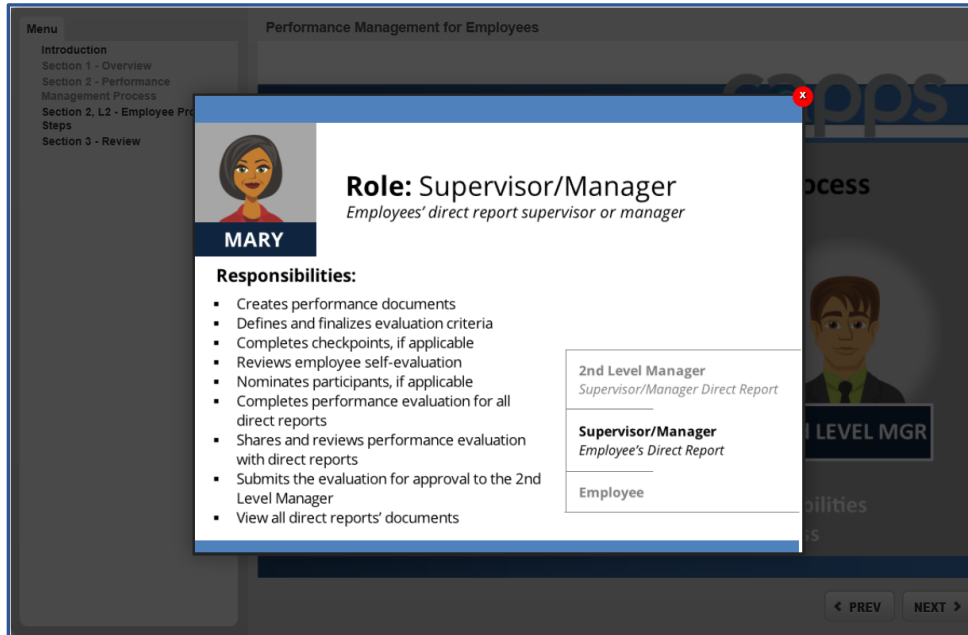
2nd Level Manager
Supervisor/Manager Direct Report

Supervisor/Manager
Employee's Direct Report

Employee

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Performance Management Training for Employees



Menu
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Section 2, L2 - Employee Process Steps
Section 3 - Review

Performance Management for Employees

MARY

Role: Supervisor/Manager
Employees' direct report supervisor or manager

Responsibilities:

- Creates performance documents
- Defines and finalizes evaluation criteria
- Completes checkpoints, if applicable
- Reviews employee self-evaluation
- Nominates participants, if applicable
- Completes performance evaluation for all direct reports
- Shares and reviews performance evaluation with direct reports
- Submits the evaluation for approval to the 2nd Level Manager
- View all direct reports' documents

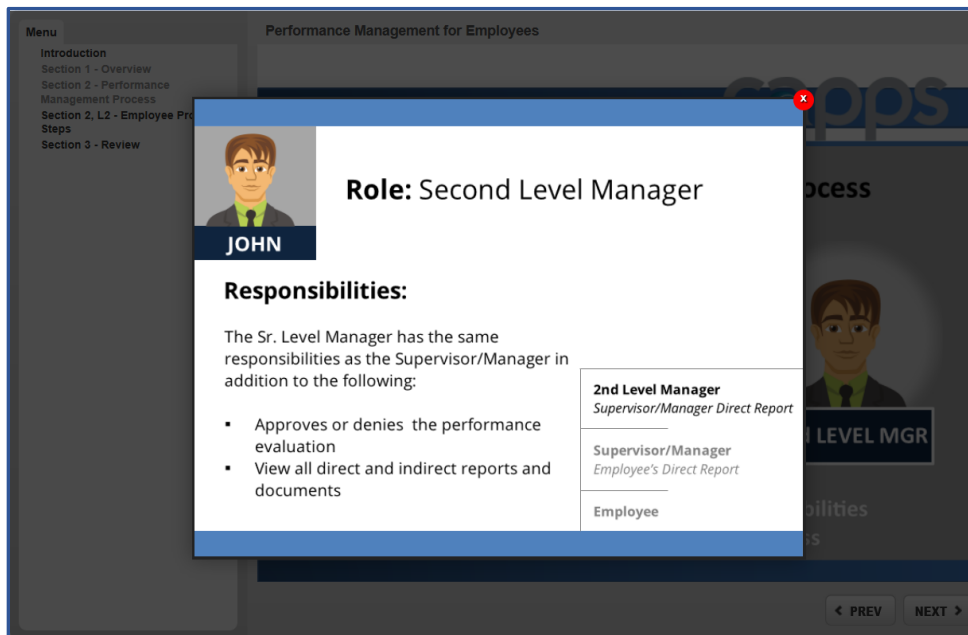
2nd Level Manager
Supervisor/Manager Direct Report

Supervisor/Manager
Employee's Direct Report

Employee

2nd Level MGR

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Menu
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Section 2, L2 - Employee Process Steps
Section 3 - Review

Performance Management for Employees

JOHN

Role: Second Level Manager

Responsibilities:

The Sr. Level Manager has the same responsibilities as the Supervisor/Manager in addition to the following:

- Approves or denies the performance evaluation
- View all direct and indirect reports and documents

2nd Level Manager
Supervisor/Manager Direct Report

Supervisor/Manager
Employee's Direct Report

Employee


2nd Level MGR

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Performance Management Training for Employees

Section 2, Lesson 2 – Employee Performance Process Steps

Performance Management for Employees

Section 2, Lesson 2 


Centralized Accounting and Payroll/Personnel System

1	The Performance Management Process	10 min
2	Employee Performance Process Steps	60 min


- Employees will perform steps within the Performance Management process.

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Performance Management for Employees

Section 2, Lesson 2 

Centralized Accounting and Payroll/Personnel System




To learn the Performance Management process, select each step in the order they appear.

Performance Management Training for Employees

Performance Management for Employees

Section 2, Lesson 2

Employee Performance Management Process Steps



1. Review Defined Criteria (if applicable)
2. Review Checkpoints (if applicable)
3. Complete Employee Self-Evaluation
4. Respond to Participant/Nominee Request
5. Review Employee Evaluation
6. Acknowledge Evaluation
7. View/Print Historical Documents

Step 1.

Performance Management for Employees

Section 2, Lesson 2 Continued

The **Manager** can share the Defined Criteria with the employee.

Defined criteria is the Purpose, Goals/Objectives, Competencies, Career Development on which the employee will be evaluated.

Sharing the defined criteria is optional not required.

Exercise(s)


Complete the exercise(s) to learn how to perform the task.

Reviewing Defined Criteria

Scenario 1: Reviewing Defined Criteria

☐ Check the box when you are ready to view the next step in the process.

STEP 1



EMPLOYEE

After completing the exercise(s) close the browser to return to the course.

Performance Management Training for Employees

Step 2.

Performance Management for Employees

Section 2, Lesson 2 Continued

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The **Manager** can track the progress of their direct reports during the evaluation period. If applicable, they can use Checkpoints to evaluate the employee referring to notes regarding the employee's progress toward achieving assigned goals.


This feedback should be discussed and reviewed with the **Employee**.

Exercise(s)
Complete the exercise(s) to learn how to perform the task.

Reviewing Checkpoint Feedback
Scenario 1: Reviewing Checkpoint 1 Feedback

☐ Check the box when you are ready to view the next step in the process.

STEP 2



EMPLOYEE

After completing the exercise(s) close the browser to return to the course.

Step 3.

Performance Management for Employees

Section 2, Lesson 2 Continued

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The **Employee** will complete their employee self-evaluation when notified by their manager.


The employee will review the Goals/Objectives, Competencies, and Career Development sections and determine how they should rate themselves based upon their performance.

Exercise(s)
Complete the exercise(s) to learn how to perform the task.

Completing Employee Self-Evaluation
Scenario 1: Completing the Employee Self-Evaluation

☐ Check the box when you are ready to view the next step in the process.

STEP 3



EMPLOYEE

After completing the exercise(s) close the browser to return to the course.

Performance Management Training for Employees

Step 4.

Performance Management for Employees

Section 2, Lesson 2 Continued

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The **Manager** may nominate up to five employees to provide feedback on the competencies of their direct report. This request can be made throughout the evaluation process and not necessarily within a specific step.


The **Employee** can decide to accept or deny the nomination to participate. If the **Employee** accepts the nomination they will fill out a participant evaluation for the selected employee. **(The Participant/Nominee's comments are not visible to the Employee.)**

Exercise(s)
Complete the exercise(s) to learn how to perform the task.

Responding to Participant Request
Scenario 1: Accepting and Completing the Participant Evaluation
Scenario 2: Declining the Participant Request

☐ Check the box when you are ready to view the next step in the process.

STEP 4



EMPLOYEE

After completing the exercise(s) close the browser to return to the course.

Step 5.

Performance Management for Employees

Section 2, Lesson 2 Continued

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The **Manager** completes the final performance evaluation for their (direct reports) employees, submits and receives approval from the 2nd level manager.


The **Employee** will review their Final Employee Evaluation once shared by the manager. The employee is able to review and comment on the final evaluation.

Exercise(s)
Complete the exercise(s) to learn how to perform the task.

Employee Final Performance Evaluation
Scenario 1: Reviewing the Employee Final Performance Evaluation

☐ Check the box when you are ready to view the next step in the process.

STEP 5



EMPLOYEE

After completing the exercise(s) close the browser to return to the course.

Performance Management Training for Employees

Step 6.

Performance Management for Employees

Section 2, Lesson 2 Continued

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The **Employee** will receive a request from their manager to acknowledge the employee final evaluation. However, it is not mandatory for an employee to acknowledge.


The manager can override the employee's acknowledgement of the evaluation for two reasons: 1) The employee isn't available; 2) The employee refused to acknowledge.

Exercise(s)
Complete the exercise(s) to learn how to perform the task.

Employee's Acknowledgement of Evaluation
Scenario 1: Acknowledging the Evaluation

☐ Check the box when you are ready to view the next step in the process.

STEP 6



EMPLOYEE

After completing the exercise(s) close the browser to return to the course.

Step 7.

Performance Management for Employees

Section 2, Lesson 2 Continued

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The evaluation is now archived within Historical Documents in CAPPS Performance and is accessible to the manager and the employee.


The performance evaluation can also be printed as needed.

Exercise(s)
Complete the exercise(s) to learn how to perform the task.

Printing the Performance Evaluation
Scenario 1: Viewing/Printing the Performance Evaluation

☐ Check the box when you are ready to view the next step in the process.

STEP 7



EMPLOYEE

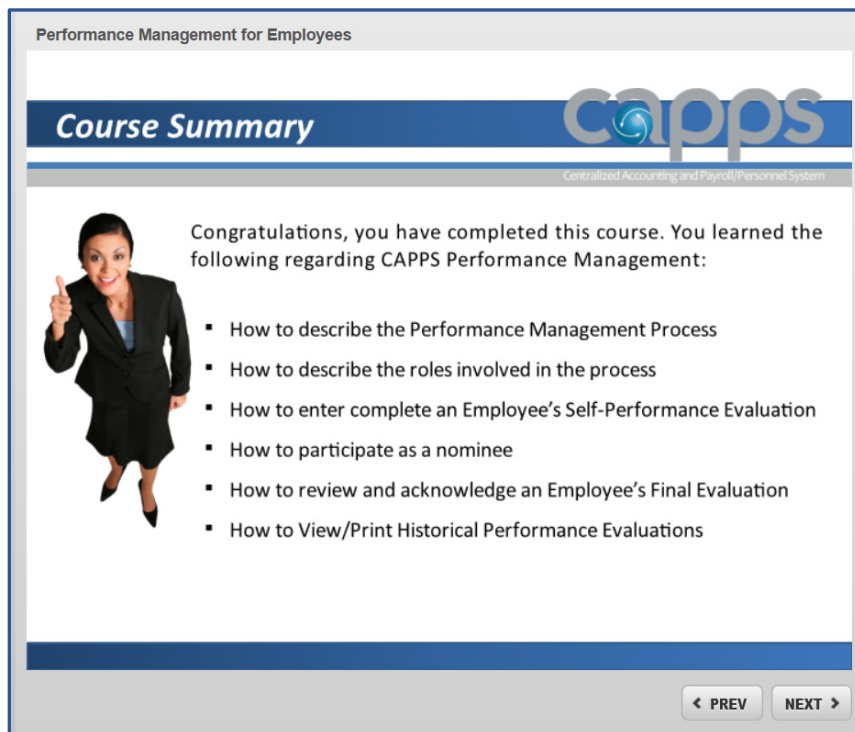
After completing the exercise(s) close the browser to return to the course.

Performance Management Training for Employees

Section 3 - Review



Course Summary



Performance Management Training for Employees

Conclusion

Performance Management for Employees


Conclusion

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Centralized Accounting and Payroll/Personnel System

This completes the course.

See you next time!

← PREV

A woman in a black blazer is smiling and giving a thumbs up with both hands. She is positioned behind a large blue arrow that points to the right, which contains the text 'This completes the course.'