



# Performance Pro Employee Training

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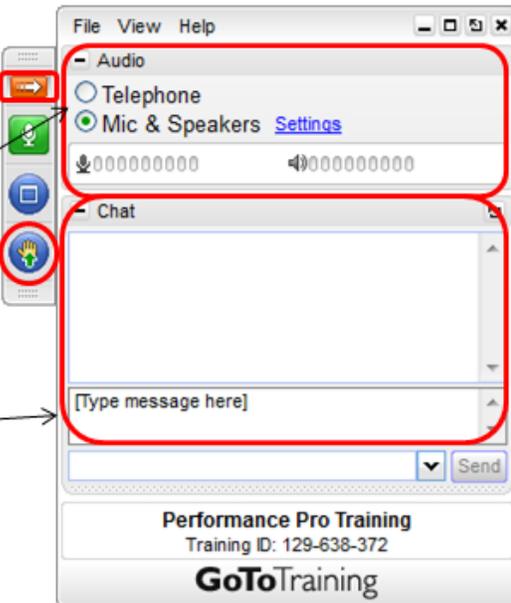
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## During the Training

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Using the Go to Training toolbar located to the right of your screen you have the ability to raise your hand or send a chat message to the trainer.

- Open and close your panel 
- View and select your audio 
- Raise your hand 
- Submit a question via chat 



As you follow along with the training, you have two options:

1. Take notes in the packet that pertain to features you want to utilize within your organization. This packet can be utilized later as you set up your system.
2. For the more technologically advanced: Open your system in an alternate browser/window. This works especially well if you utilize dual monitors. The training is fast-paced and you must be comfortable toggling back and forth rather quickly.

## Objectives

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In the Performance Pro Employee Training, we will log into Performance Pro as an employee. By the end of the training, you will have an understanding of how to complete a Self-Performance Evaluation using Performance Pro. The key objectives for this training include:

- Identify the steps it takes to complete a Performance Evaluation as an employee
- Discuss the importance of adding comments on a Performance Evaluation
- Discover the Performance History
- Adding goals
- E-Signing a Performance Evaluation

## Performance Evaluation Overview

Employee Information Summary ▾

<b>Employee:</b> Jane Doe	<b>Hire Date:</b>	<b>Position:</b> Training Specialist
<b>Department:</b> Administration	<b>Branch:</b> Branch 00	<b>Location:</b>
<b>Review Period:</b> 01-01-2018 - 06-30-2018	<b>Supervisor/Manager:</b> Mohr, Megan 100%	<b>Job Title:</b>

Performance Review Overview Route Information Expand all comments

**Competency (70%)**

Job Knowledge	20%
Training Performance	20%
Communication	20%
Feedback	10%
Teamwork & Cooperation	10%
Attention to Detail	10%
Productivity	10%

**Goal (30%)**

Test Goal	100%
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- **Competency**
  - Behaviors/Competencies
  - The “How”
  - Position-centric
- **Goal**
  - Specific Objectives
  - The “What”
  - Person-centric



## Weights

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<b>Competencies 70%</b>			
	Weight	Score	Weighted Score
HR Task Perf.	25%	4	1
Teamwork	25%	3	0.75
Accountability	15%	2	0.3
Communication	10%	5	0.5
Quality	10%	4	0.4
Initiative	10%	3	0.3
Problem Solving	5%	2	0.1
<b>Total</b>	<b>1.00</b>		<b>3.35</b>
<b>Goals 30%</b>			
	Weight	Score	Weighted Score
Goal 1	25%	3.5	0.875
Goal 2	40%	4	1.6
Goal 3	35%	3	1.05
<b>Total</b>	<b>1.00</b>		<b>3.525</b>
Competencies	70%	3.35	2.35
Goals	30%	3.525	1.0575
<b>Overall Score</b>			<b>3.40</b>

Notes:

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## Accessing Performance Pro

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**URL:** Each organization will have a unique URL or website address that is used to access Performance Pro:

<https://sdreedsburgcm.perfpro-hrnonline.com>

**User Name:** Same as your Employee Access User Name

**Password:** **Reedsburg123**

If given a general password, you will be required to set your own password the first time you login.

- Passwords must be 8 - 12 characters in length.
- Passwords must contain an upper and lowercase letter, as well as a number.
- Passwords cannot contain the word "password" or "free trial."



**Notes:**

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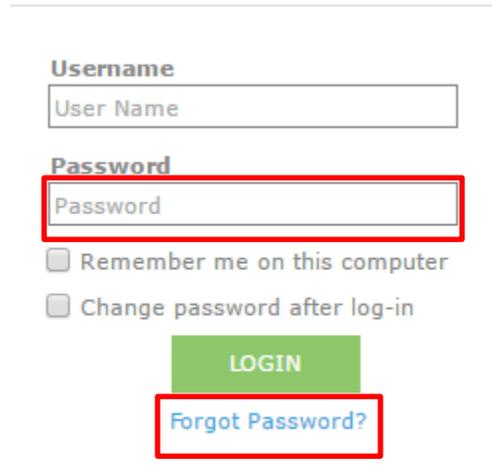
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## Forgot Password

If you enter the incorrect Password and Username combination 5 or more times, you will be locked out of your system and will need to contact an Administrative User for assistance.

**We recommend that you use the Forgot Password option before you get locked out.**



The image shows a login form with the following elements:

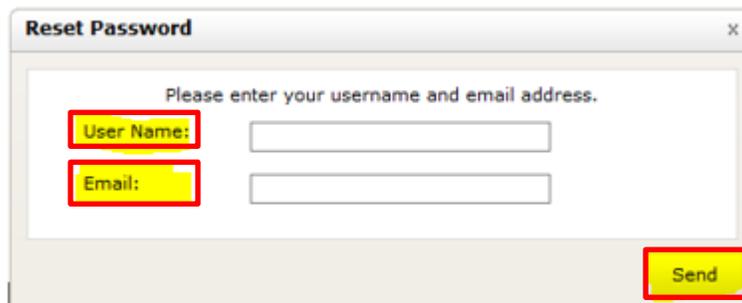
- Username:** A text input field containing "User Name".
- Password:** A text input field containing "Password", which is highlighted with a red border.
- Remember me on this computer
- Change password after log-in
- LOGIN:** A green button.
- Forgot Password?:** A blue link, also highlighted with a red border.

Notes:

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## Forgot Password Link

When you click the link you will get a pop up window. You will need your username and email address to have the ability to reset your password with this link. You will need to enter the information. A link will be sent to you by email, and is only active for 1 hour after it has been sent.



The image shows a "Reset Password" pop-up window with the following elements:

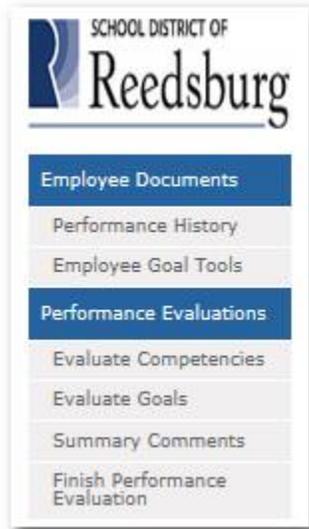
- Header: "Reset Password" with a close button (X).
- Text: "Please enter your username and email address."
- User Name:** A label and an input field, both highlighted with a red border.
- Email:** A label and an input field, both highlighted with a red border.
- Send:** A yellow button, highlighted with a red border.

**Note:**

In some cases, your username may be the same as your email address. If that is the case, you can enter the same information in both fields and click send. If you do not have your username you must contact your Administrative User to obtain the information.

## Navigation & Menus

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**Tool Bar.** Used to navigate the system. It gives you access to Save, Spelling, Language Check, Help and your employee selection menu.

**Menu.** Gives you access to the different system features including the Performance Evaluation.

**Role.** Ensures you have access to the features needed to complete a Performance Evaluation.



**Note:** The employee dropdown is disabled while on the Home Screen. To select an employee, you will need to go to the area of the menu you need, *then* select the employee.

## Performance Evaluation

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### Performance Evaluation Process with a Self-Performance Evaluation



- Evaluator: 3 Additional Steps
  - ✓ Evaluate Competencies
  - ✓ Evaluate Goals
  - ✓ Summary Comments
  - ✓ Mark Ready
  - ✓ Merge Performance Evaluations
  - ✓ Routing for Additional Approval
  - ✓ Performance Discussion With Employee
  - ✓ “Completes” Performance Evaluation
  - ✓ E-Sign Performance Evaluation

### Completing a Performance Evaluation

An Evaluator can complete a Performance Evaluation in 5 easy steps.

- 1. Evaluate Competencies:** Evaluate assigned Competencies, provide a numerical rating and add comments.
- 2. Evaluate Goals:** Evaluate previously established goals (if applicable), provide a numerical rating and add comments.
- 3. Summary Comments:** Complete Summary Comments section as required by your organization.
- 4. Finish Performance Evaluation (Mark Ready, Merge, Route & Complete):** Mark the Performance Evaluation as Ready. Merge the employee’s Self-Performance Evaluation with the Evaluator’s evaluation and complete the Performance Evaluation.

**EMPLOYEE:** The action of Marking Ready for Meeting for the employee will lock the employee out of the Performance Evaluation.

**EVALUATOR:** The action of Marking Ready for the Evaluator starts the finishing steps for the Performance Evaluation. The Evaluator will still have the ability to edit the Performance Evaluation until it has been marked complete with the exception of during the routing process.

# Evaluate Competencies

(Performance Evaluations > Evaluate Competencies > Evaluation)

After selecting the Competency you want to evaluate, read through the Description and Competencies Level Definitions on the left. Enter a score based on the Behaviorally Anchored Rating Scale details and add comments. Note that there is no Save button while navigating the Performance Evaluation screens as the system will automatically save your changes.

## Comments

Why do we add comments?

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- **Spelling.** Scans the Comment section for misspelled words.
- **Language Check.** Highlights potentially offensive or discriminatory language.

# Evaluate Goals

(Performance Evaluations > Evaluate Goals > Evaluation)

Evaluating Goals is as easy as evaluating Competencies.

**SCHOOL DISTRICT OF Reedsburg**

Performance Evaluations  
**Evaluate Goals**

Overview Evaluation Set Future Goals

**Keep Files for Students updated** Back Next

Due 04-01-2018 — This goal is to keep student files up to date on all activities.

**5 - Exceeded:** All aspects of the goal have been achieved. Performance exceeded expectations.

**4 - Complete:** All major aspects of the goal have been achieved. Performance met expectations.

**3 - Progress:** Significant progress has been made in completing major aspects of the goal.

**2 - Incomplete:** Marginal progress has been made, but major aspects of the goal are incomplete.

**1 - Not addressed:** Little or no progress has been made toward completion of this goal.

**Employee:** Employee, Joe

4.50

5  
4  
3  
2  
1  
0

**Employee Comments**

I was able to work out a schedule that allowed me to keep all student files up-to-date.

**Goal Progress**

Employee: Employee, Joe Progress

Not Started  
 In Progress  
 Complete

## Summary Comments

*(Performance Evaluation > Summary Comments)*

Summarize performance for the Performance Evaluation period. This section is also customizable to fit the needs of your organization, requiring additional information from the employee.

The screenshot shows the 'Summary Comments' page for a performance evaluation. On the left is a navigation menu with options like 'Employee Documents', 'Performance Evaluations', and 'Summary Comments'. The main content area has a 'Summary Comments' section with a text box containing 'I think I did good!'. To the right, there are progress bars for 'Overall Progress', 'Goal Progress', and 'Competency Progress', all at 100%. Below these is a 'View Current Performance Evaluation' button and 'Employee Performance Evaluation Information' including 'Position: HR Specialist', 'Performance Evaluation Period: 11-21-2017 - 11-20-2018', and 'Evaluators: Public, John'. A calendar for January 2018 is visible at the bottom left of the page.

## Finish Performance Evaluation

*(Performance Evaluation > Finish Performance Evaluation)*

### Ready

As an employee, once a Performance Evaluation is marked Ready, it will move into a read-only finalized copy unavailable for future edits.

The screenshot shows a notification box with a 'Status Overview' tab and a 'Ready' tab. The message says: 'Your next step is to mark the Performance Evaluation "Ready for Meeting"'. There is a 'Mark Ready' button on the right.

## E-Signature

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E-Signatures are generated once the Performance Evaluation has been marked complete.

Signature	Signed Date	Action
Test, Employee Employee		<input checked="" type="checkbox"/> Check this box to sign this document electronically - Upon saving this signature, no further comments may be added and the Agree/Disagree status may not be changed <input checked="" type="radio"/> Agree <input type="radio"/> Disagree <input type="button" value="Add Comment"/>

## Performance History

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Performance History is your employee's virtual personnel file. It includes current and historical Performance Evaluations, Forms, a place to document performance and an area to attach external documents pertaining to performance management.

## Performance Evaluations

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*(Employee Documents > Performance History > Performance Evaluation Form)*

Completed historical Performance Evaluations can be accessed and printed at any time from the Performance Evaluation Form tab. You can also come here to view or print the current Performance Evaluation.



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**Reedsburg**

Employee Documents  
**Performance History**

Employee, Joe

Performance Evaluation Form | Forms | Notes | Additional Documents | Peer Feedback

Status	Date	Score
CURRENT	06-01-2013 to 05-31-2014	3.54
HISTORY	06-01-2014 to 05-31-2015	4.20
HISTORY	06-01-2012 to 05-31-2013	4.52
HISTORY	06-01-2011 to 05-31-2012	4.04
HISTORY	06-01-2010 to 05-31-2011	4.30

## Notes

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*(Employee Documents > Performance History > Notes)*

As a reminder, the Note section on the Home Screen is where you add notes on your own performance throughout the Performance Evaluation period that can be used as part of the Performance Evaluation if applicable. The Notes section in Performance History is where you track details on your employee's performance throughout the Performance Evaluation period.

**Note:**

This section of Performance Pro is designed to assist you in the Performance Process. As you note the items you would like to remember in the Performance Evaluation, it is imperative that you ensure that the notes are clear and concise. Make sure that those who are viewing the note for the first time will understand the situation, the action taken and the needed follow up.

### Answer Three Questions!

1. **What** is the behavior?
2. **Why** is it important to my organization?
3. **How** am I going to remedy or reinforce the behavior?

## Additional Documents

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*(Employee Documents > Performance History > Additional Documents)*

Make Performance Pro your one-stop shop for all Performance Management documentation. By loading and storing files in Additional Documents, you are storing things in the “cloud.” Anyone with access to the employee’s file will be able to access the needed files from any computer with an active internet connection.

After selecting the Add New File button, simply enter the required details and Browse out to your computer (like attaching a file to an email). Locate the file you would like to add to the employee’s file and click Upload on the toolbar.

Appraisal Form Forms Notes Additional Documents

**Edit File**

Name:

Description:

File:  Browse... 1

2 Upload

**Note:**

It is very important when using this section that the files be named with a unique title. Performance Pro will not allow you to have 2 of the same document assigned in the system. Suggested format: Employee Name-Title of Document-Date of document.

**Notes:**

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## Wrapping Things Up

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### Objectives

In the Performance Pro Employee Training, we logged into Performance Pro as an employee. You should now have an understanding of how to complete a Self-Performance Evaluation using Performance Pro. The key objectives for this training were:

- Identify the 5 easy steps it takes to complete a Performance Evaluation.
- Discuss the importance of adding comments on a Performance Evaluation.
- Write a Performance Note that incorporates the three elements suggested in Performance Documentation.
- View Performance History.