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GENERAL OVERVIEW

The Learning Management System (LMS) is one of many tools available to support the users of the County’s Collaborative Performance Management System (CPMS). It provides an easy to use resource to:

- Notify the employee and supervisor of CPMS deadlines and facilitate communication about roles and responsibilities
- Document the goals and performance factors agreed to during performance planning
- Align individual goals to higher-level goals for the work unit, department, or County
- Create action plans (specific tasks with dates) to support the accomplishment of each goal
- Report and track progress on action plans and results
- Capture performance feedback from coaching discussions between the employee and supervisor to help make interim progress reviews and year-end evaluations more constructive and meaningful
- Develop and finalize the performance evaluation
- Find helpful resources, such as videos and “how-to” guides

It is important to note that LMS is a tool for CPMS, not the process itself. CPMS processes such as performance planning, SMART goal setting, and providing feedback and coaching require collaboration and dialog between the employee and his/her supervisor to establish clear expectations and guide performance. LMS provides a helpful way to support and document this collaboration.
LOGGING INTO LMS

1. Go to [www.co.sanmateo.ca.us/LMS](http://www.co.sanmateo.ca.us/LMS).

2. Select the My Career Development Site.

3. Login using your nine-digit employee ID number (found on your e-advice).

   If you don’t remember your password, click on the Forgot Your Password link to reset it.

If you have login difficulties, contact your department’s LMS Administrator.

### CPMS PILOT DEPARTMENT LMS ADMINISTRATORS

<table>
<thead>
<tr>
<th>Department</th>
<th>LMS Administrator</th>
<th>Phone Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>County Manager’s Office</td>
<td>Mina Lim</td>
<td>363-4124</td>
</tr>
<tr>
<td>- Agricultural Weights &amp; Measures</td>
<td>Ronald Pummer</td>
<td>363-4700</td>
</tr>
<tr>
<td>- Public Safety Communications</td>
<td>Robert Bustichi</td>
<td>363-4342</td>
</tr>
<tr>
<td>First 5</td>
<td>Maricela Watt</td>
<td>372-9500, x223</td>
</tr>
<tr>
<td>Housing</td>
<td>Yvonne Ho</td>
<td>802-3379</td>
</tr>
<tr>
<td>Human Resources</td>
<td>Gabe Aponte</td>
<td>363-4847</td>
</tr>
<tr>
<td>Human Services Agency</td>
<td>Kathy Merlo</td>
<td>802-7965</td>
</tr>
<tr>
<td>Library</td>
<td>Nicole Pasini</td>
<td>312-5274</td>
</tr>
<tr>
<td>Parks</td>
<td>Sara Medina</td>
<td>363-4084</td>
</tr>
<tr>
<td>Planning &amp; Building</td>
<td>Virginia Diehl</td>
<td>363-1857</td>
</tr>
<tr>
<td>Probation</td>
<td>Bridget Love</td>
<td>312-5261</td>
</tr>
<tr>
<td>Public Works</td>
<td>Marney Taylor</td>
<td>599-1451</td>
</tr>
</tbody>
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PERFORMANCE PLANNING & GOAL SETTING
To access the Performance Planning and Goal Setting page, hover your mouse over the Performance tab on the LMS Home page and click on Performance Planning and Goal Setting.

This tab is where you will set and manage your goals. It is also where you can view other goals that are relevant to you.

This page contains Goal Tabs, designed to separate goals by category:

- **My Goals**: This is where your individual goals will display.
- **Team Goals**: This tab is only viewable to supervisors. Goals set by direct reports will display here. If team members haven’t yet set up goals, this tab will not display.
- **Manager’s Goals**: This tab is where you will see the individual goals your supervisor has set for him or herself.
- **Department Goals**: This tab is where department goals will be displayed.
- **County Goals**: Displays the Shared Vision 2025 Community Outcomes as well as any other countywide goals and priorities.
Employee & Supervisor discuss goals for the year. Supervisor provides direction as appropriate and may assign goals directly to team members.

Employee creates SMART goals

Employee sends goals to supervisor for approval

Supervisor approves OR edits, discusses edits with Employee and then approves

Employee manages goals

Supervisor monitors goal progress

Supervisor denies goals and discusses needed revisions
CREATE A SMART GOAL

Once you’ve prepared your SMART goal, navigate to the Performance tab and click on Performance Planning and Goal Setting.

It does not matter what tab you are under (My Goals, Manager’s Goals, etc.) when you click on the Create button. There is only one goal creation page.

If you are a supervisor, later in the process you will have the option to specify whether the goal you have created is for yourself or whether you are assigning it to one or more members of your team.
2 SELECT GOAL ALIGNMENT

A CREATE AN ALIGNED SMART GOAL

Most individual goals will be aligned to a higher-level goal. If you want to create an aligned goal, select the pre-existing goal you wish to align with on the screen and click on the Next button.

Create Goals

Align:

- Do not align
- County Vision 2035 Collaborative Community: Our leaders form partnerships, promote regional solutions, and inform and engage residents, and approach decisions with fiscal accountability and concern for future impacts.
- County Vision 2035 Environmentally Conscious Community: Our natural resources are preserved through environmental stewardship, reducing our carbon emissions, increasing energy, water, and land use efficiency.
- County Vision 2035 Healthy Community: Our neighborhoods are safe and affordable communities with access to quality health care and wholesome services.
- County Vision 2035 Livable Community: Our growth occurs in transit, promotes affordable, walkable communities.

OR...

B CREATE AN INDEPENDENT SMART GOAL

On rare occasions, an individual goal will be independent of higher-level goals. If you want to create an independent goal, select Do not align and click on the Next button.

Create Goals

Align:

- Do not align
- County Vision 2035 Collaborative Community: Our leaders form partnerships, promote regional solutions, and inform and engage residents, and approach decisions with fiscal accountability and concern for future impacts.
- County Vision 2035 Environmentally Conscious Community: Our natural resources are preserved through environmental stewardship, reducing our carbon emissions, increasing energy, water, and land use efficiency.
- County Vision 2035 Healthy Community: Our neighborhoods are safe and affordable communities with access to quality health care and wholesome services.
- County Vision 2035 Livable Community: Our growth occurs in transit, promotes affordable, walkable communities.

On the next screen, you will be able to input your goal.
If you are creating an aligned goal, the **SMART Goal** field will be pre-populated with the details of the goal you are aligning with. This is to be taken as a starting point. You can and will likely need to edit the goal details to reflect the scope of the goal that is appropriate to your job.

Enter your goal in this field.

**Goals Library:** Click here to view pre-made sample SMART goals.

Enter a goal **description**, if appropriate.

You can use this field to note data sources you will use to measure your result or provide other helpful context for your goal.
Set the **start** and **projected completion date** of your goal.

**Visibility:** Check this box to make your goal visible to others. This aids information sharing and alignment.

If this is a goal you do not wish to share, do not check this box.

**Category:** Categorize your goal – is this a development goal, or a performance goal?
Create a SMART Goal

**Targets:** To add a quantifiable target to measure the progress on your goal, click the plus sign. Targets are optional.

**Target Values:** Any quantifiable measure (currency, days, other numbers) you wish to track will go here. Your Target is the number you want to reach, and your Start Value is where you are as of today.

**Action Items:** Add action items that describe the steps you will take to reach your goal by clicking on the plus sign. You may add as many action items as needed to achieve your goal.

**Set start/end dates and weights for your action item.**
Weighting: The weight feature in LMS is intended to allow users to assign a level of importance to an Action Item and/or Target. The weighting values must add to 100%, otherwise LMS won’t allow you to click to the next screen.

Assigned weight values will impact your overall goal percentage completion rate as you update your goal’s progress.

Attachments: You may attach any project/action plans or other documents related to your goal by clicking on the plus sign. Accepted file formats are Word, Excel, PowerPoint, Outlook, pdf, .txt, .rtf, .gif and/or .jpg files here.

There is a 1 MB file size limit.
You have the option to save your goal as a draft and continue working on it later.

If you are a supervisor, click Next to proceed.

If you do not have any direct reports, click Submit.

IF YOU DO NOT SUPERVISE ANY EMPLOYEES, SKIP TO STEP 5.
ASSIGN A SMART GOAL (FOR SUPERVISORS)

If you are a supervisor, you will have the option to create this goal for yourself or to assign it to one or more members of your team.

A  ASSIGN AN INDIVIDUAL GOAL

If this is an individual goal, check the Yourself button and click Submit.

Skip to Step 5.

B  ASSIGN A TEAM GOAL

If you’d like to set this as a goal for your team, click on the Your Team button.

You will see all of your direct reports and will have the option to make this goal a separate goal for each user (individually assigning it to one or more members of your team).

You can also assign goals to your indirect reports (if any) by clicking on the Direct and Indirect Reports checkbox.

Once you’ve configured your goal the way you want it, click Submit.
5 SEND A GOAL APPROVAL REQUEST

A CLICK ON “SEND AN APPROVAL REQUEST”

This triggers an email to your supervisor asking him/her to approve your individual goal.

Note: This step only applies to individual goals. Goals created and assigned by supervisors do not require approval.

B CONFIRM THE REQUEST

You will be asked to confirm whether you want to submit your goal(s) for approval. If you are sure, click Yes.

If you click Yes, you will receive a confirmation.

Your goal will now show up in the My Goals tab with the status of Pending Approval. Your supervisor has the option to approve, deny, or modify your goal. You will receive an email notification once your supervisor takes action on your goal approval request.

IF YOU DO NOT SUPERVISE ANY EMPLOYEES, SKIP TO “MANAGE YOUR GOALS” ON PAGE 23
THIS PAGE INTENTIONALLY LEFT BLANK
You will receive an email notification whenever you have a goal to approve.

To approve a goal, log into LMS, and on your home page, click on the Approve Goals link in Your Inbox.

1 APPROVE OR DENY REQUEST WITHOUT REVIEW

On this screen, click on the boxes next to the goals you’d like to take action on and click on Approve Request or Deny Request. This option provides a quick way to act on goals you have previously reviewed and/or discussed with your direct reports.

Whatever action you take (approve or deny), an email notification is sent to the employee who submitted the goal.
If you wish to see the goal in greater detail prior to approving or denying it, or if you’d like to make modifications to a submitted goal:

### A
Under the **Options** column, click **Approve/Deny**.

### B
Click on the **Edit** icon next to **General Goal Information** in the upper left-hand corner of the page.

**If you do not need to edit anything, skip to step D.**

### C
Select and edit the goal details as necessary. All fields of the goal – **Action Items**, **Targets**, **Dates**, **Goal**, **Goal Description** – are editable by the supervisor.

**IMPORTANT!** Supervisors should discuss the modifications to the goal with the employee to ensure clear, mutual understanding of expectations. Both the employee and supervisor will be able to see a history of the actions taken related to the goal, including when and by whom the goal was changed.
If you select **Deny**, LMS will prompt you for comments, which will be included in the notification to the employee. Here you may enter the reasons why you denied the goal.

**Click on Approve or Deny.**

An email notification is sent to the employee who submitted the goal.
MANAGE YOUR GOALS

The LMS Performance Management Module makes it very easy for you to manage your goals. Using LMS, you can view your goals, monitor and update the status of Action Items and/or Targets, post comments, upload documents, and make revisions.

1 UPDATE GOAL PROGRESS

When you wish to update your goal progress by changing the status of Action Items and/or Targets, navigate to the Performance tab and click on Performance Planning and Goal Setting.

Click on the goal you wish to edit. This will take you to the Manage Goals page.

Note: Clicking on this icon will generate an Adobe PDF printout of your current goals.
On this page you will have the option to update your progress on **Action Items** and adjust **Targets**, if any.

**Arrows**: These up/down arrows expand and collapse sections of the **Manage Goals** page.

**C UPDATE ACTION ITEM PROGRESS**

To update the progress on any of your **Action Items**, simply key in the updated percentage completion on any of the individual items.
D  UPDATE TARGET PROGRESS

To update the progress on any of your Targets, simply key in the updated actual value on any of the individual items.

Note: Updating the Progress in either your Action Items or Targets will change your overall goal progress percentage, depending on the weights you have assigned to each item.

E  CLICK SAVE AND CLOSE

Clicking Save and Close will save all your changes and close this screen.
2 EDIT A SMART GOAL

If you wish to edit the content of an existing goal, navigate to the Performance tab and click on Performance Planning and Goal Setting.

A CLICK EDIT

Under the Options column, click on the Edit icon, on the right-hand side of the goal you wish to edit.

Note: Editing a goal will require that your goal be re-approved by your supervisor. Once you click on Submit Changes, the goal status will change to Pending Modification Approval.

B MAKE YOUR CHANGES

On this page you can change the goal statement; change time frames; edit, add, or delete action items and/or targets; add comments; and post attachments.
Clicking **Submit Changes** completes the goal editing process.
### ADD COMMENTS

In order to enhance team communication, LMS allows users to interact on the **Goal** page.

**A**

**TO ADD A COMMENT, CLICK ON THE PLUS ICON NEXT TO “COMMENTS”**

---

**B**

**ENTER YOUR COMMENTS IN THE POP-UP BOX. CLICK “SAVE” WHEN COMPLETE**

---

**C**

**ONCE YOUR COMMENT HAS BEEN MADE, YOU CAN EDIT/DELETE YOUR COMMENT BY USING THE ICONS ON THE RIGHT-HAND SIDE OF THE “COMMENTS” SECTION**

---

The interface works much like a threaded discussion forum, since both the supervisor and employee can post comments to this area. All comments are time-stamped.
4 ADD ATTACHMENTS

You can use LMS to store documents related to your goals on the Goal page.

A TO ADD AN ATTACHMENT, CLICK ON THE PLUS ICON NEXT TO “ATTACHMENTS”

B CLICK “BROWSE”

Click Browse to find the file you wish to upload on your system.

Once you’ve found it, click Upload.
C  SUCCESS!

Your file will now appear under the **Attachments** section.

---

**5  VIEW HISTORY**

LMS stores a history trail of all activity performed on a goal, including modifications, approvals, and denials, with a time stamp and the name of the person taking the action.

To view this information, simply click on the arrow next to **History**.
PERFORMANCE FEEDBACK & COACHING
(FOR SUPERVISORS)
To access the Performance Feedback and Coaching Module, go to the My Team tab.

The My Team tab was already part of LMS, but has been upgraded to better support CPMS. It is a tool for those who supervise others.

Learn how to navigate the My Team interface by visiting the different tabs available and exploring their functionality.

1 EXPLORE THE ACTIONS WITHIN YOUR PROFILE

Your profile will appear at the top of the left pane.

Note: If you do not have direct reports, you will not see this tab on your LMS page.
Hover your mouse over this arrow to view shortcuts for running reports, sharing LMS managerial permissions, assigning training, or creating goals.

To Do’s: You may assign To Do’s to your direct reports on this tab.

Action Items: Goals awaiting your approval will appear under this tab.
2 CREATE A TO DO

A CLICK ON PLUS SIGN NEXT TO “ADD TO DO”

B FILL IN ALL REQUIRED FIELDS

In the pop-up window, fill in all required fields. You may select to whom (from your direct reports) you’d like to assign this To Do.

C CLICK SAVE

Your employees will now be able to manage their To Do’s from their Home tab.
THIS PAGE INTENTIONALLY LEFT BLANK
Click on the name of one of your direct reports to view his/her Tasks, Profile, Performance, Calendar, and Comments.

Tasks: Will include Action Items from Goals, as well as Assigned Training and Assigned Tasks.

Profile: Includes the employee’s general information and LMS transcript.
**Performance:** The Performance tab offers a “one-stop shop” interface where you can view all of your direct report’s goals, including progress, status, and completion dates.

**Calendar:** View your direct report’s important LMS dates here, including training dates, goal milestones, etc.
**ADD COMMENTS**

You can use My Team as a virtual supervisory drop-file to add comments and attachments to document performance. All information on My Team is confidential and available only to you.

**A  POST COMMENTS**

Type your comments into the Comments Field and click Post. Your comments will be time-stamped and can be used to summarize the feedback you have provided to your direct reports and save the notes from your coaching sessions.

**B  ADD ATTACHMENTS**

To add any attachments, click on Browse, search for the file you wish to upload on your system, and then click Upload.
OVERVIEW OF PERFORMANCE REVIEW AND EVALUATION PAGE

To access the Performance Review and Evaluation page, hover your mouse over the Performance tab on the LMS Home page and click on My Performance Review and Evaluation.

You will see a review link on this page that you can click on once the review period has opened. Click on it and follow the on-screen steps to complete.

If it is not currently review period time, there will be nothing available on this screen.
PERFORMANCE FACTOR EXPECTATIONS

At the beginning of the performance cycle, there will be an opportunity for supervisors and employees to discuss and document expectations regarding CPMS Performance Factors.

LMS will generate a task to request supervisors and their direct reports to review the list of Performance Factors and post comments. Supervisors will receive an LMS email when these Factors are ready to be reviewed and will start the process.

A CLICK ON THE PERFORMANCE FACTORS LINK UNDER “YOUR TASKS” ON THE LMS HOME PAGE

B REVIEW THE WORKFLOW DIAGRAM AND INSTRUCTIONS ON THIS PAGE AND CLICK CONTINUE
C COMPLETE THE FORM

The supervisor will start the process by posting his or her comments. These comments are intended to indicate the Factors that are most critical to successful performance for this job, employee, and review period and to provide any examples and explanations that might be helpful to describe expectations.

C CLICK CONTINUE

The Factors with the supervisor’s comments will then be available for the employee’s review. The employee will also follow steps A-C to add his/her comments.

D SUPERVISOR SUBMITS FINAL FORM

The supervisor will be prompted via LMS email to review the employee’s Factor comments. Once reviewed, the supervisor will click Submit.
The completed form will be available for both the employee and supervisor to review throughout the performance cycle. Once finalized, the Factors document will be in Adobe PDF format and will not be editable by either party.

This document will provide a helpful reference during feedback and coaching sessions, interim reviews and the year-end performance evaluation.

1 SUPERVISOR ACCESS

The supervisor may access the completed Factors document in My Team, under the employee’s Performance tab.

2 EMPLOYEE ACCESS

The employee may access this document at My Performance Review and Evaluation, under the Performance tab.
RESOURCES
The **Performance** tab in LMS contains many helpful CPMS resources. Simply click on **Resources** under the **Performance** tab to access these.

You may also visit [www.co.sanmateo.ca.us/hr/cpms](http://www.co.sanmateo.ca.us/hr/cpms) to access the CPMS web site.

**Resources include:**

- The CPMS Process Guide
- Procedural “How-To” guides on various topics, like goal setting and performance review
- An FAQ section
- Videos
- Templates