About the Collaborative Performance Management System (CPMS)

Performance Review & Evaluation Steps

Performance Factors

Logging in to the LMS

For Employees:
- EMPLOYEE SELF REVIEW
- CONFIRMATION and SIGN OFF BY EMPLOYEE
- CREATE PDF OF YOUR EVALUATION

For Supervisor/Managers
- PRELIMINARY EVALUATION BY SUPERVISOR
- FINALIZATION AND SIGN OFF BY SUPERVISOR
- CREATE PDFS OF YOUR EMPLOYEE’S EVALUATIONS

For Indirect Managers:
- REVIEW AND SIGN-OFF BY INDIRECT MANAGER
What is Collaborative Performance Management System (CPMS)?

Performance management is a form of good people management. The Collaborative Performance Management System is a systematic and ongoing process of communication and collaboration between a supervisor and an employee during a year-long performance management cycle. It aligns individual performance to the County’s strategic priorities and supports individual learning and development. The performance management cycle has three parts:

- **Performance Planning and Goal Setting**: to clarify expectations, set goals and define what successful performance looks like, as documented in the employee’s individual performance plan.
- **Performance Feedback and Coaching**: to let employees know how they are doing and encourage learning and effective future performance.
- **Performance Review and Evaluation**: to discuss and document performance during the year based on feedback given throughout the cycle, and set the stage for next year’s performance planning and goal setting.

What is the purpose of this User Guide?

This User Guide outlines the workflow of the Performance Review and Evaluation phase of CPMS, as facilitated by LMS. The Learning Management System (LMS) has many tools to support people’s use of CPMS.

Who is the User Guide for?

This guide is for employees, supervisors/managers, and indirect managers.

- As an employee you can create your Employee Self Review, confirm and sign-off on the Final Evaluation, and create a PDF of the Evaluation.
- As a supervisor to the employee (referred to as an supervisor or manager throughout this guide) you can, draft the Preliminary Evaluation, finalize and sign-off on the final evaluation, and create a PDF of the Evaluation.
- As an indirect manager you can review and sign off on the Evaluation.

What is a Performance Review and Evaluation?

Performance Review is the process resulting in the creation of a formal evaluation which summarizes prior feedback and discussions of performance over the course of the review period. The formal evaluation reflects the extent to which expectations set at the beginning of the cycle were met. Supervisors are expected to have regular informal communication during the year through scheduled “one-on-one” meetings and with “on-the-spot” discussions regarding the status of a particular project or assignment.

When are Performance Evaluations completed?

Performance Reviews and Evaluations are to be completed annually. All employees are to be evaluated at the same time, in synch with the fiscal year. Probationary employees are to be evaluated at least once during their probationary period. This typically occurs 30 days prior to the end of their probationary period, or based on the departmental or position requirements.
There are seven steps in the CPMS Performance Review and Evaluation, five (5) of which are facilitated by and completed with the Learning Management System (LMS). The five steps done in the LMS shown in the graphic above and are italicized below.

⭐ Performance Review and Evaluation Steps

1. Preparation of Supervisor and Employee (outside of the LMS)

2. Employee Self Review

3. Preliminary Evaluation and Update by the Supervisor

4. Performance Review and Evaluation meeting (outside of the LMS)

5. Review and sign-off by Indirect Manager

6. Finalization and Sign-off by Supervisor

7. Confirmation and Sign-off by Employee

Once the above steps are complete, the Employee and the Supervisor can begin planning for the future performance cycle.
Performance Factors

★ INDIVIDUAL CONTRIBUTION

Quantity
- Performs appropriate amount of work or services on a timely basis

Quality
- Extent to which the work is complete, thorough, effective and accurate

Innovation
- Takes calculated risks for the benefit of customers and/or the organization
- Uses information technology to improve effectiveness and achieve results
- Is open-minded when presented with a new perspective or new ideas
- Looks for other solutions when traditional methods don’t work

Level of Effort
- Is self-motivated and maintains effort despite obstacles and setbacks
- Accomplishes assigned individual goals and objectives effectively, efficiently, and according to standards and expectations
- Sees opportunities or identifies potential problems and takes the initiative to follow through rather than wait for problems to arise

Commitment to Service
- Committed to quality public service through statements and actions
- Takes personal responsibility for meeting commitments to internal and external customers and correcting problems
- Readily adjusts priorities to respond to current needs and changing customer demands

Attendance
- Complies with attendance requirements
- Arrives at work on time
- Is punctual with lunch hour and break periods

Attention to Safety
- Follows safety processes and procedures and demonstrates safe behavior in all actions and activities

★ PROFESSIONALISM

Adherence to County Standards and Policies

Integrity
- Assumes responsibility and accountability for decisions and actions
- Demonstrates high standards of honesty, trust, and openness

Respect
- Treats all persons with courtesy and respect

Cooperation
- Willing to help others
- Values others’ input and expertise and is willing to learn from others
- Consistently develops and sustains cooperative working relationships
- Is receptive to feedback
- Asks for and accepts help or assistance when needed

Responsiveness
- Anticipates and responds to external change
- Is flexible when faced with external constraints, and adapts methodology and ideas quickly to immediate or anticipated changes in the external environment

Reliability
- Can be depended upon to accept assignments and complete work and projects on time
- Does what needs to be done to deliver and achieve results
- Maintains a professional demeanor in stressful and difficult situations

CPMS User Guide for Performance Review and Evaluation
Performance Factors

Adaptability
- Adapts behavior and work methods in response to new information, changing conditions, or unexpected obstacles to get the best out of a situation
- Understands other people’s points of view

Ethical conduct
- Behaves in a fair and ethical manner toward others

★ PROBLEM SOLVING and JUDGEMENT

Quality of job-related decisions
- Identifies the cause of problems and finds the necessary resources and
- information to solve the problems
- Re-sets priorities based on changing needs or new requests
- Maintains the best interests of the County as well as customers
- Makes sound job-related decisions, develops alternative solutions and recommendations and selects proper course of action; understands impact of decision and actions
- Takes responsibility for understanding the reasoning behind key policies, practices and procedures

Organizational skills
- Prioritizes workload and manage information flow efficiently

Leadership
- Is proactive in approach to the job
- Shows initiative and flexibility in meeting challenges and solving problems

Creativity
- Develops new methods and approaches for the purpose of improvement

★ INTERPERSONAL SKILLS

Orally expresses ideas and facts in a clear, organized, and convincing manner in a style, tone, and level appropriate to the audience and the occasion

Expresses facts and ideas in writing in a clear, convincing, and organized manner that is appropriate to the audience and the occasion

Respects cultures and values different from one’s own

Interpersonal Communication
- Listens empathically
- Resolves interpersonal conflict effectively
- Works jointly with others and is open to different and opposing perspectives in order to achieve better outcomes
- Keeps management informed of decisions
- Uses multiple channels to ensure effective communication (email, phone, meetings)

★ JOB SPECIFIC CONTRIBUTION

Job specific knowledge
- Understands job procedures, methods, components, facts and information related to assignments
- Remains up to date with job-related laws, regulations, policies, procedures, trends, and developments

Job specific skills
- Applies appropriate technical and procedural skills related to assignments
Performance Factors

★ MANAGING EMPLOYEE PERFORMANCE (for Managers and Supervisors)

Recommendating or Selecting Talent
- Makes selection decisions that are objective, fair, consistent, job related, and documented
- Values cultural diversity and individual differences in the workforce
- Uses the probationary period properly and effectively

Coaching and Developing Talent
- Provides or ensures that staff receives ongoing feedback, coaching, and mentoring to increase skills/knowledge and improve performance
- Identifies, plans and/or provides training, support, and growth experiences
- that support and enhance goal achievement and performance
- Delegates effectively to develop staff and build productive capacity
- Recognizes and rewards achievements and contributions

Leadership
- Political Astuteness - Considers probable support or opposition to ideas or actions based on political interest and constraints
- Sets priorities to align work with, and in support of, agency or division goals
- Uses strategies to promote team morale and productivity
- Asks questions to encourage team input and focuses team on the topic at hand.
- Acts to promote a cooperative environment conducive to personal and professional development and employees’ sense of belonging.
- Makes difficult or controversial decisions when necessary

Maintaining High Standards of Performance
- Establishes and clearly communicates performance goals and expectations
- Responds to employees’ needs, ensuring they have the necessary resources to do their work
- Acts to correct behaviors and performance that are inconsistent with goals, standards, and expressed values and interests
- Initiates and supports progressive disciplinary action when coaching and corrective actions fail to correct performance or conduct problems
- Supports programs and activities that promote employee well being and balance.

Evaluating Performance
- Communicates goals, standards and expectations at the beginning of the annual performance management cycle
- Provides timely feedback and coaching throughout the year so that annual performance evaluations contain no surprises
- Conducts performance evaluations annually and writes clear and constructive narratives to support ratings

Operating within Legal, Labor, and Policy Framework
- Treats all employees in a fair and equitable manner
- Maintains a work environment free of illegal bias or discrimination, harassment, and retaliation

Managing the Work
- Ensures that processes are in place to achieve program/unit goals
- Ensures that service quality meets the appropriate standards and expectations
- Plans, organizes and prioritizes the work of the unit effectively
- d. Manages financial resources wisely to contain or reduce costs

★ DISCRETIONARY FACTOR - OTHER
(To be added by Supervisor)
- Instructions: Add criteria applicable to the Department or Unit, not already covered by the Countywide categories.

CPMS User Guide for Performance Review and Evaluation
1) Go to www.co.sanmateo.ca.us/LMS.

2) From the drop down, select the My Career Development Site.

3) Login using your nine-digit employee ID number (found on your e-advice) and enter your LMS password. You have three tries to enter your password before the system will lock you out for one hour.

If you forgot your password, click on the Forgot Your Password link to reset it.

If you have login difficulties, contact your Department LMS Administrator.

Welcome to the San Mateo County Learning Management System!

Please log in to My Career Development Site

- Career Training & Development
- Performance & Employee Development
The Employee Self Review is one of the first steps in creating the Review and Evaluation in the Learning Management System. This step is illustrated in the CPMS workflow below. You may notice that in this step both Employee Self Review and the Preliminary Evaluation by Supervisor are highlighted by colored boxes in the same column. This is because both reviews are intended to be completed at or around the same time, and prior to moving forward to the next step, the Preliminary Evaluation Meeting. However, if an employee does not complete the Self Review, the supervisor can still move forward with the Performance Evaluation and may “submit” the evaluation to his/her Manager after having met with the employee to discuss the Preliminary Evaluation, updating the evaluation (if applicable).
From the Home Page, under the Your Task Section 1) click on the Self Review Task to navigate to the first page in the Learning Management System (LMS) Performance Review and Evaluation.

★ What, Where or Why is That?

The Self Review tasks appear on the Users Home Page, under Your Tasks.

Each task has a due date assigned to it. The due date listed on the right hand side of the task name.

Up to 3 tasks will be shown on the Home page, in the Your Tasks Section. To view additional and/or completed tasks:

Click on “View All” (which appears at the bottom right when three or more tasks are shown) to navigate to the “Scheduled Tasks” Page or click on “Scheduled Tasks” from the colored navigation bar under the “Home” Tab.

Tasks past their due date will have a yellow exclamation point to the right of the task name.
Before beginning, get familiar with the **Navigation Bar**. The Navigation Bar is on the left-hand side of every page in the Performance Module. The Navigation Bar will guide the User through the available pages of the Performance Evaluation.

While completing the Employee Self Review, there are four action buttons available at the bottom of Navigation bar: Save, Cancel, Print and Submit. There is also an attachments button which allows for attachments to be uploaded to Learning Management System (LMS), including them with the Evaluation (maximum 3 attachments per Evaluation).

Clicking “Save” will save the work completed. It will save the information entered during this log in as well as other information entered prior. **If you have not begun any work in the LMS the “Save” button will not appear.**

Clicking “Cancel” will cancel the work completed/entered during this log in. It will not cancel prior saved work, if any.

Clicking “Print” will create a PDF of the Performance Review and Evaluation in its current status.

If you click on “Submit” a pop-up window will appear. The window will warn that clicking submit and “OK” means you will not be able to modify your responses once you have submitted the self-review. In addition, clicking “OK” will send a notification to your supervisor/manager letting him/her know that you completed the Employee Self Review. **If you have not begun any work in the LMS the “Submit” button will not appear.**
1) Click “continue” below the Collaborative Performance Management System workflow or click on Employee Self Review in the Navigation Bar to move to the Employee Self Review Page.

★ What, Where or Why is That?

The Employee Self Review Overview page (above) shows the CPMS workflow in the middle of the screen and has a Navigation Bar on the right hand side. The only area accessible to the employee (as shown by the green dot) at this time is “Employee Self Review”.

The Employee Self Review Page has instructions for the employee at the top of the page. To read the full instructions, use the scroll bar on the right hand side of the instruction box.
1) **Type your response** to the corresponding question in the free form text boxes provided. Responses can be cut and pasted from a Word document but, they may need to be reformatted. The text can also be bolded, italicized, underlined, bulleted and/or numbered by clicking on the associated format icon.

**★ What, Where or Why is That?**

The Employee Self-Review gives you an opportunity to respond to nine questions where you provide your input to your supervisor regarding your performance during the Performance Review and Evaluation period and identify areas for future support and growth. It also informs the conversation between an employee and the supervisor during the Performance Review and Evaluation meeting. The nine questions are:

1. List your job Performance Goals and comment on your success in achieving each one during this Performance Review Period.
2. List your professional Development Goals and comment on your success in achieving each one during this Performance Review Period
3. Comment on your success in meeting the relevant Performance Factors for your position. Provide specific examples when possible.
4. What do you feel were your greatest contributions to the organization during this Performance Review Period?
5. Where did you experience difficulties, challenges or obstacles?
6. What suggestions do you have for improving the efficiency, effectiveness, or service orientation of your division or department?
7. What do you see as your Performance Goals for the year ahead?
8. What do you see as your Development Goals for the year ahead?
9. How can your supervisor and/or manager help you in achieving these goals?
While completing the Employee Self Review, there are four action buttons available at the bottom of the Employee Self Review screen: Previous, Save and Exit, Save and Continue, and Submit. **1) Submit only when you have a final product**

If you click on “Previous” the system will take you back to the Performance Review and Evaluation Overview page. The information entered during this log in will be saved.

If you are not finished and want to save your work, **click on “Save and Exit.”** The system will return you to the Performance Evaluation Overview page and work completed/entered during this log in will be saved.

If you click **“Save and Continue”** the system will take you back to the Performance Review and Evaluation Overview page and work completed/entered during this log in will be saved.

If you are finished, **click “Submit”**. A pop-up window will appear.

Clicking **“OK”** will send a notification to your supervisor letting him/her know that you completed the Employee Self Review. And, as the pop-up window indicates, clicking “submit” and “OK” means you will not be able to modify your responses. The next step is the Performance Evaluation Meeting with your supervisor.
You may notice that both the Employee Self Review and the Preliminary Evaluation by Supervisor are highlighted by colored boxes in the same column. This is because both reviews are intended to be completed at or around the same time and prior to moving forward to the next step, the Preliminary Evaluation Meeting. However, if an employee does not complete the Self Review, the supervisor can still move forward with the Performance Evaluation, the Preliminary Evaluation Meeting, and may update and “submit” the Evaluation to his/her Manager for review.

★ What, Where or Why is That?

The Collaborative Performance Management System (CPMS) workflow is shown on the CPMS Overview page. The workflow has the Employee Self Review and the Preliminary Evaluation by the Supervisor shown in the same step (same column). If the two boxes are highlighted by a color (as shown in the first graphic below) the Employee has not yet completed his/her Self Review. If the Employee Self Review is grayed out (as shown in the second graphic box below—objects may not appear different if this document is printed in black and white—), the Employee has submitted his/her Self Review.
From the Home Page, under the Your Task Section 1) **click on the evaluation task** to navigate to the first page in the Learning Management System (LMS) Performance Review and Evaluation.

★ **What, Where or Why is That?**

Performance Review and Evaluation tasks will appear on the Users Home Page under Your Tasks

Each task has a due date assigned to it. It is listed on the right hand side of the task name.

Up to 3 tasks will be shown on the Home page, in the Your Tasks Section. To view additional and/or completed tasks:

- Click on “View All” to navigate to the “Scheduled Tasks” Page (shown to the right)

- or,

- Click on “Scheduled Tasks” from the purple navigation bar under the “Home” Tab

Tasks that have past their due date will have a yellow exclamation point to the right of the task name.
Before beginning, get familiar with the **Navigation Bar**. The Navigation Bar is on the left-hand side of every page in the Performance Module. The Navigation Bar will guide the User through the available pages of the Performance Evaluation.

While completing the Employee Self Review, there are four action buttons available at the bottom of Navigation bar: Save, Cancel, Print and Submit. There is also an attachments button which allows for attachments to be uploaded to Learning Management System (LMS), including them with the Evaluation (maximum 3 attachments per Evaluation).

Clicking “Save” will save the work completed. It will save the information entered during this log in as well as other information entered prior. ** If you have not begun any work in the LMS the “Save” button will not appear.**

Clicking “Cancel” will cancel the work completed/entered during this log in. It will not cancel prior saved work, if any.

Clicking “Print” will create a PDF of the Performance Review and Evaluation in its current status.

If you click on “Submit” a pop-up window will appear warning you clicking submit and “OK” means you will not be able to modify your responses once you have submitted the Evaluation. In addition, clicking “OK” will send a notification to your supervisor letting him/her know that you completed the Preliminary Evaluation for your direct report and that it is available for his/her review as the indirect manager. ** If you have not begun any work in the LMS the “Submit” button will not appear.**
1) **Click “continue”** below the Collaborative Performance Management System workflow (shown at the bottom of the page) or **click on the colored title/text** in the Navigation Bar associated with the Performance Evaluation you want to complete.

**Scheduled Tasks**

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
<th>Status</th>
<th>Start Date</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supervisor Evaluation of Emmy Employee</td>
<td>12JUL_Annual Performance Review</td>
<td>Incomplete</td>
<td>4/1/2021</td>
<td>4/14/2021</td>
</tr>
<tr>
<td>Supervisor Evaluation of Ed Employee</td>
<td>12JUL_Annual Performance Review</td>
<td>Incomplete</td>
<td>4/1/2021</td>
<td>4/15/2021</td>
</tr>
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<td>Supervisor Evaluation of Eli Employee</td>
<td>12JUL_Annual Performance Review</td>
<td>Incomplete</td>
<td>4/1/2021</td>
<td>4/16/2021</td>
</tr>
</tbody>
</table>

**What, Where or Why is That?**

The Performance Evaluation landing page has an overview, instructions/purpose, and a rating tab (which contains the various ratings and a the respective description). Below the overview box is a diagram depicting Performance Review workflow and to the left is the Navigation Bar.
1) **Click on Employee Self Review** to review the “read-only” comments provided by the employee during the Employee Self Review. If the employee has submitted the Self Review, you can read his/her responses; however if he/she has not yet submitted the Self Review only the questions will appear (no responses) on this page.

![Image of Employee Self Review page](image)

**What, Where or Why is That?**

The instructions to the employee are shown at the top of the screen. Instructions for the supervisor are below the employee instructions. To review the instructions use the scroll bar on the right hand side of the instruction box to view the entire message.

![Image of instruction box](image)
1) Click “Save and Continue” at the bottom of the Employee Self Review or click on Performance Goals on the Navigator Bar to navigate to the Performance Goals page. On this page you will select and comment on the Employee’s performance goals.
Once on the Performance Goals page, 1) click **Select Goals** (found below the instructions). A pop up window will appear with the Employee’s Performance Goals. In the window, 2) **check the box associated with the goal you want to include** for this review period, then 3) **click add** to add these goals to the Evaluation.
Once you have selected and added the goals, the system will return to the Performance Goals page. The selected goals will appear on the page. 1) Select a rating from the rating drop down (required) then 2) enter the comments that support the rating (required) in the free form text box. If you are unsure as what rating is best suited, click on the “rating” tab for a description of each rating.

After selecting a rating and entering the supporting narrative for each of the Performance Goals, 3) click “Save and Continue” or click “Development Goal” in the Navigation Bar on the left-hand side of the page to navigate to the Development Goals page.

If you click on “Previous” the system will take you back to the Employee Self Review Page. The information entered will be saved.

If you click on “Save and Exit” the system will return you to the CPMS Overview page. The system will save the work completed/entered during this log in.
On Development Goals Page, 1) click “Select Goals.” A pop up window will appear with the Employee’s Development Goals. In the window, 2) check the box associated with the goal you want to include for this review period, then 3) click add to add these goals to the Evaluation.
Once you have selected and added the goals, the system will return to the Development Goals page. The selected goals will appear on the page. **1) Select a rating from the rating drop down (required) then 2) enter the comments that support the rating (required)** in the free form text box. If you are unsure as what rating is best suited, click on the “rating” tab for a description of each rating.

After selecting a rating and entering the supporting narrative for all Development Goals, **3) click “Save and Continue” or click “Performance Factors”** in the Navigation Bar on the left-hand side of the page to navigate to the Performance Factor page.

If you click on “Previous” the system will take you back to the Performance Goals Page. The information entered will be saved.

If you click on “Save and Exit” the system will return you to the home page. The system will save the work completed/entered during this log in.
On the Performance Factors Page there are (up to) six Performance Factors for evaluation. 1) Select a rating from the rating drop down box associated with the respective Performance Factor then, 2) enter specific comments which support the rating. If you are unsure as what rating is best suited, click on the “rating” tab for a description of each rating.

After selecting a rating and entering the supporting narrative for all Performance Factors, 3) click “Save and Continue” or click “Overall Performance Rating” in the Navigation Bar on the left-hand side of the page to navigate to the Overall Performance Rating page.

If you click on “Previous” the system will take you back to the Development Goals Page. The information entered will be saved.

If you click on “Save and Exit” the system will return you to the home page. The system will save the work completed/entered during this log in.
The last item to comment and rate is the Employee’s Overall Performance. Just like with Performance Goals, Development Goals and factors, 1) select a rating from the drop down (required) and 2) enter the supporting comments (required).

After selecting a rating and entering the supporting narrative, 3) click “Save and Continue” or click “Schedule Performance Meeting” in the Navigation Bar on the left-hand side of the page to navigate to the Schedule Performance Meeting page.

If you click on “Previous” the system will take you back to the Performance Factors Page. The information entered will be saved.

If you click on “Save and Exit” the system will return you to the home page. The system will save the work completed/entered during this log in.
On the Schedule Performance Review Meeting page, 1) type the date and time of the Performance Review meeting in the free form text box provided. Then, 2) click “Save” (exit or continue – depending on what you want to do next). Do not submit until after meeting with the Employee and making any necessary revisions based on the Employee’s input AND/OR the Employee Self Review due date has passed.

If you click on “Previous” the system will take you back to the Overall Performance Page. The information entered will be saved.

If you click on “Save and Exit” the system will return you to the home page. The system will save the work completed/entered during this log in.

If you click on “Save and Continue” the system will take you to the Collaborative Performance Management System Home/Overview Page. This is the option you should to choose at this point in the process.

Do not “submit” until meeting with the employee. After meeting with the employee you will need to log back into the LMS and make any necessary revisions to the Evaluation to incorporate employee input. By clicking “submit” the system will notify your manager to review the Performance Evaluation provided that either a) Employee Self Review Due Date has passed and/or b) the employee has submitted his/her Self Review (whichever comes first). “Submitting” will also move forward in the workflow. Once you click “submit” you will not be able to make any changes before your manager reviews the document.
Once you have had the **Performance Evaluation Meeting with the employee**, reviewed his/her Self Review (if completed) and discussed the Preliminary Performance Evaluation, **log back into the Learning Management System, make any updates or revisions** to the Performance Evaluation, then **“Submit”** the Performance Evaluation.

If you click on “Submit” a pop-up window will appear warning you clicking submit and “OK” means you will not be able to modify your responses. In addition, clicking “OK” will notify your manager that you completed the Preliminary Performance Evaluation for your direct report. It will also move the review forward to the next step in the workflow. Once you click “submit” you will not be able to make any changes before your manager reviews the document.

A copy of the Preliminary Evaluation may be printed in its DRAFT form. However, it is important that since the Preliminary Evaluation is a DRAFT it is not circulated or shared.
The Review and Sign off by the Indirect Manager is an opportunity for managers to ensure that the indirect manager’s direct reports are conducting appropriate and consistent evaluations of their direct reports. If there is information that you, as the indirect manager, feel should be included or modified in the Performance Evaluation, please discuss this with the supervisor/manager.

While much of the information in the review is read-only, indirect managers can make comments on overall performance of an employee prior to signing the performance review. The indirect manager comments will be viewable by the supervisor/manager and the employee and will be included in the final Performance Evaluation.

Once you have signed the document, click “submit”. Clicking “submit” will send a notification to the supervisor that you have finished reviewing and commenting on the document. It will also enable the supervisor to make any final modifications to the Evaluation based on any comments you may have discussed with him/her before sending it to the employee for confirmation and signature.
From the Home Page, under the Your Task Section **1) click on the indirect manager review task** to navigate to the first page in the Learning Management System (LMS) Performance Review and Evaluation.

★ What, Where or Why is That?

Performance Review and Evaluation tasks appear on the Users Home Page, under Your Tasks.

Each task has a due date assigned to it. The due date listed on the right hand side of the task name.

Up to 3 tasks will be shown on the Home page, in the Your Tasks Section. To view additional and/or completed tasks:

Click on “View All” (which appears at the bottom right when three or more tasks are shown) to navigate to the “Scheduled Tasks” Page or

Click on “Scheduled Tasks” from the colored navigation bar under the “Home” Tab.

Tasks past their due date will have a yellow exclamation point to the right of the task name.
Before beginning, get familiar with the **Navigation Bar**. The Navigation Bar is on the left-hand side of every page in the Performance Module. The Navigation Bar will guide the User through the available pages of the Performance Evaluation.

While completing the Employee Self Review, there are four action buttons available at the bottom of Navigation bar: Save, Cancel, Print and Submit. There is also an attachments button which allows for attachments to be uploaded to Learning Management System (LMS), including them with the Evaluation (maximum 3 attachments per Evaluation).

Clicking “Save” will save the work completed. It will save the information entered during this log in as well as other information entered prior. ** If you have not begun any work in the LMS the “Save” button will not appear.**

Clicking “Cancel” will cancel the work completed/entered during this log in. It will not cancel prior saved work, if any.

Clicking “Print” will open Adobe Acrobat and allow you to print a PDF of the Performance Review and Evaluation in its current status.

If you click on “Submit” a pop-up window will appear warning you that clicking submit and “OK” means you will not be able to modify your responses once you have submitted the Evaluation. In addition, clicking “OK” will send a notification to the supervisor letting him/her know that you completed the Indirect Manager Review and Sign-Off. ** If you have not begun any work in the LMS the “Submit” button will not appear.**
1) Click on the colored title/text associated with the Performance Evaluation you want to review or click “Continue” below the Collaborative Performance Management System workflow.

Scheduled Tasks

<table>
<thead>
<tr>
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<tbody>
<tr>
<td>Review and Sign Off of Emmy Employee</td>
<td>15PR_15T_Annual Performance Review</td>
<td>Incomplete</td>
<td>4/1/2011</td>
<td>4/1/2020</td>
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🌟 What, Where or Why is That?

The Performance Evaluation landing page has an overview, instructions/purpose, and a rating tab (which contains the various ratings and a the respective description). Below the overview box is a diagram depicting Performance Review workflow and to the left is the Navigation Bar.
1) Review the Employee Self Review and Preliminary Performance Evaluation in the Learning Management System (LMS). The pages will be read-only. You will not be able to make any edits to the information in the LMS. If there are items that you feel should be added, modified, or removed, meet with the supervisor to discuss the changes.

As you review the pages, the respective text in the Navigation Bar on the left-hand side will turn from a red button to a green button. 2) Click “Save and Continue” at the bottom of each page to view each page or click on the associated colored text/title in the Navigation Bar of the page you would like to review. The last page of the Review and Sign-Off by Indirect Manager is the Signature Confirmation page.

Clicking “Save” will save the work completed. It will save the information entered during this log in as well as other information entered prior.

Clicking “Cancel” will cancel the work completed/entered during this log in. It will not cancel prior saved work, if any.

If you click on “Previous” the system will take you back to the CPMS Overview page. The information entered will be saved.

If you click on “Save and Exit” the system will return you to the home page. The system will save the work completed/enter during this log in.

A copy of the Preliminary Evaluation may be printed in its DRAFT form. However, it is important that since the Preliminary Evaluation is a DRAFT it is not circulated or shared.

CPMS User Guide for Performance Review and Evaluation
On the Signature Confirmation Page, 1) type your name in the Indirect Manager field. 2) Enter any overall comments you may want to share with the employee. Your comments will be included in the final, printed copy of the Employee Performance Evaluation. 3) Click “Sign.”

Clicking “sign” will date the page and disable the signature field. If you need to “re-sign” (changing the date in captured in the LMS as when the Evaluation was signed), you may do so long as you have not submitted the Review.
Once you have signed and included any necessary comments, **1) click “Submit”**. Submitting the review will notify the supervisor to Update and Finalize the Performance Evaluation, moving forward in the workflow. Once you click “submit” you will not be able to make any changes to your comments or re-sign the document.

If you click on “Previous” the system will take you back to the last page you reviewed.

If you click on “Save and Exit” the system will return you to the CPMS Overview page. The system will save the work completed/enter during this log in.

If you click on “Save and Continue” the system will take you to the Collaborative Performance Management System Overview Page.

Clicking “submit” will create a task for the supervisor to Update and Finalize the Performance Evaluation, moving forward in the workflow. Once you click “submit” you will not be able to make any changes to your comments or re-sign the document.
Once the indirect manager has reviewed the performance evaluation, electronically signed it, and “submitted” it, a task will be assigned to the supervisor/manager, enabling him/her to log back into the Learning Management System (LMS) and finalize and sign the Performance Evaluation. During this step the supervisor/manager can make final revisions and updates to the Evaluation, making sure to make any modifications suggested by the indirect manager. Then, he/she can include any final comments, electronically sign and date the review, and “submit” the review for the employee confirmation and signature.
From the Home Page **1) click on the title/text of task** to navigate to the first page in the Learning Management System (LMS) Performance Review and Evaluation.

**What, Where or Why is That?**

Performance Review and Evaluation tasks appear on the Users Home Page, under Your Tasks.

Each task has a due date assigned to it. The due date listed on the right hand side of the task name.

Up to 3 tasks will be shown on the Home page, in the Your Tasks Section. To view additional and/or completed tasks:

Click on “View All” (which appears at the bottom right when three or more tasks are shown) to navigate to the “Scheduled Tasks” Page or

Click on “Scheduled Tasks” from the colored navigation bar under the “Home” Tab.

Tasks past their due date will have a yellow exclamation point to the right of the task name.
Before beginning, get familiar with the **Navigation Bar**. The Navigation Bar is on the left-hand side of every page in the Performance Module. The Navigation Bar will guide the User through the available pages of the Performance Evaluation.

While completing the Employee Self Review, there are four action buttons available at the bottom of Navigation bar: Save, Cancel, Print and Submit. There is also an attachments button which allows for attachments to be uploaded to Learning Management System (LMS), including them with the Evaluation (maximum 3 attachments per Evaluation).

Clicking “Save” will save the work completed. It will save the information entered during this log in as well as other information entered prior.

Clicking “Cancel” will cancel the work completed/enter during this log in. It will not cancel prior saved work, if any.

Clicking “Print” will open Adobe Acrobat and allow you to print a PDF of the Performance Review and Evaluation in its current status.

The “submit” button only appears after you have successfully navigated through all prior pages of the Performance Review. If you click on “Submit” a pop-up window will appear warning you clicking submit and okay means you will not be able to modify your responses once you have submitted the Evaluation. In addition, clicking “OK” will send an task to your employee letting him/her know that you completed Performance Evaluation; it is ready for the employee’s confirmation and signature.
The Learning Management System (LMS) navigates the supervisor to where he/she left off prior to submitting the Performance Evaluation, the schedule Performance Review Meeting page. In order to update, finalize and sign off on the evaluation, 1) click “Save and Continue” or click “Employee Self Review” in the Navigation Bar on the left-hand side of the page to navigate to through and update the Evaluation (as needed). You must review the completed Employee Self Review page even though no changes can be made. The system requires that every page be reviewed (clicked on). Reviewing each the pages turns the red radio buttons in the Navigation bar on the left-hand side page green and allows the supervisor to in order to “submit” the Evaluation.

FINALIZATION AND SIGN-OFF BY SUPERVISOR

On the space provided below, please note date and time of review meeting with employee.

Comments:
Scheduled Performance Meeting Tuesday, August 17, 2012 for 10:33 AM

Save and Continue
1) Click on the colored title/text (associated with the Performance Evaluation you want to complete) or click “Continue” below the Collaborative Performance Management System workflow.

What, Where or Why is That?

The Performance Evaluation landing page has an overview, instructions/purpose, and a rating tab (which contains the various ratings and a the respective description). Below the overview box is a diagram depicting Performance Review workflow and to the left is the Navigation Bar.
The Employee Self Review remains read only; changes cannot be made to what the employee submitted. To move forward, 1) click “Save and Continue” at the bottom of the page or click on the respective title/text of the page you want to review, edit, update, change from the Navigation Bar on the left-hand side of the page. Remember the system requires that every page be reviewed (clicked on). Reviewing each the pages turns the red radio buttons in the Navigation bar on the left-hand side page green and allows the supervisor to in order to “submit” the Evaluation.

FINALIZATION AND SIGN-OFF BY SUPERVISOR

Jet your job Performance Goals and comment on your success in achieving these goals during this Performance Review Period.

Employee Self Review Comments - 25UAT

Performance Goals - Goal #1

These are the goals that clearly describe tasks that are required on the job. For example, an accountant might have a goal to prepare and submit monthly financial statements. A librarian might have a goal to catalog and return books within 12 hours. A mail clerk might have a goal that requires her to deliver all mail daily to all work sites. Evidence of the job goals make the expectations for the job clearer than they are listed on the job description. These goals personalize the job to the position and to the individual employee.

Employee Self Review Comments - 25UAT

Development Goal - Development Goal #1

Professional development goals specify what the employee will learn for the coming year. While attending a class to learn something new is double, to to find new ways to help employees develop their skills while clearly linking the goal to the organization’s needs. For example, “cross training in a new work area at least one day per week is a professional development goal.” A better goal would be to cross train in the accounting department at least once per week and be able to reconcile bank statements by October 31.

How can your supervisor and/or manager help you in achieving these goals?

Employee Self Review Comments - 25UAT

- Offer you valuable knowledge, knowledge that can assist in career advancement and a sense of fulfillment.
- Serve as a liaison to network with individuals and leaders in the agency and/or County.
- Spend time training job-related skills, showing “trust in the team” which will reduce errors, increase knowledge and improve accuracy.
- Permit schedule adherence for personal and professional development classes or training programs.
- Assign special duties outside of normal duties.
Make any modifications, updates, or additions to the Performance Goals, Development Goals, and/or Performance Factors that you and/or the indirect manager feel should be made or included. The ratings change be changed and the information in the free form text fields can be added and/or removed.

As you review each page the red radio button will turn to green.

1) Click “Save and Continue” (at the bottom of each page) or click on the respective title/text of the page you want to review, edit, update, change from the Navigation Bar on the left-hand side of the page.
On the Signature Confirmation Page, 1) add any additional, final comments you feel should be included in the final Performance Review (optional). Then, 2) type your name in the manager signature field and 3) click “Sign”. You may re-sign (giving it a new signed date) so long as you have not submitted the evaluation. Once you have signed and dated the evaluation in its final form, 4) click “Submit”.

Clicking “Submit” will send a notification to the employee that his/her Performance Evaluation is complete. It will enable him/her to log into the Learning Management System (LMS) to make final comments, sign and submit the Evaluation.

If you have not electronically signed the Evaluation, by typing your name in the respective field, the evaluation will not “Submit.” In addition, the evaluation will not submit if all the radio buttons in the Navigation Bar are not green. A green radio button indicates that respective page has been reviewed.
The final step in the Collaborative Performance Management System is the Confirmation and Sign-Off by Employee. After the supervisor/manager finalizes and signs off on the evaluation a notification is created in the Learning Management System (LMS) which enables the employee to log into the LMS, review the Evaluation, make a final comment (if desired), sign, and submit the Evaluation. The system requires that every page be reviewed (clicked on). Reviewing each the pages turns the red radio buttons in the Navigation bar on the left-hand side page green and allows the supervisor to in order to “submit” the Evaluation.
CONFIRMATION AND SIGN-OFF BY EMPLOYEE

From the Home Page **1) click on the title/text of task** to navigate to the first page in the Learning Management System (LMS) Performance Review and Evaluation.

![Learning Management System](image)

**What, Where or Why is That?**

Performance Review and Evaluation tasks will appear on the Users Home Page under Your Tasks.

Each task has a due date assigned to it. It is listed on the right hand side of the task name.

Up to 3 tasks will be shown on the Home page, in the Your Tasks Section. To view additional and/or completed tasks:

- Click on “View All” to navigate to the “Scheduled Tasks” Page (shown to the right)
- or,

Click on “Scheduled Tasks” from the purple navigation bar under the “Home” Tab

Tasks that have past their due date will have a yellow exclamation point to the right of the task name.
During the Confirmation and Sign Off by Employee the Employee Self Review will be read-only. This means that no changes can be made to the information submitted earlier in the process.

1) Click “Save and Continue” at the bottom of each page to view each page or click on the associated colored text/title in the Navigation Bar on the left hand side which corresponds to of the page you would like to review. Remember, the system requires that every page of the Performance Evaluation be reviewed and every red radio button is turned green.
Like the Employee Self Review page, the Performance Goals, Development Goals, and Performance Factors pages will be read-only. This means that no changes can be made to the information submitted earlier in the process.

1) Click “Save and Continue” at the bottom of each page to view each page or click on the associated colored text/title in the Navigation Bar on the left hand side which corresponds to of the page you would like to review.
On the Overall Employee Comments you may **1) enter any additional comments** you have about the performance review process, your performance and/or development throughout the rating period. Once you have entered the information, **2) click “Save and Continue”**.
On the Signature Confirmation page, you are given an additional opportunity to enter any comments you would like to include as part of your final Performance Evaluation. Then, **1) type your name** in the self signature field and **2) click “Sign”**. You may re-sign (giving it a new signed date) so long as you have not submitted the evaluation. Once you have signed and dated the evaluation in its final form, **3) click “Submit”**.

Clicking “submit” will finalize the evaluation. Once you click “submit” you will not be able to make any changes.

If you have not electronically signed the Evaluation, by typing your name in the respective field, the evaluation will not “Submit.” In addition, the evaluation will not submit if all the radio buttons in the Navigation Bar are not green. A green radio button indicates that respective page has been reviewed.
Create PDF of Evaluation (For Employees):

1. Log into the LMS
2. Go to the Performance Tab
3. Click on My Performance Review and Evaluation
4. Click on the colored text/title of the Performance Evaluation you want to open
5. From the pop-up box, click “OK” to access the PDF.
1. Go to the My Team tab
2. Find the employee who you want to print/access the Performance Evaluation for
3. Click on the Performance icon
4. Then click “Reviews”
5. Click on the colored text/title of the Performance Evaluation you want to open
6. From the pop-up box, click “OK” to access the PDF of the employee’s Performance Evaluation
7. Create PDF of employee’s Performance Evaluation (For Supervisors/Managers)