



Job Performance Plans

Preface

Performance Plans have been initiated by the agency Human Resources office, but the **Manager** (supervisor) is responsible for entering **expected performance standards (work outcomes and behaviors)**.

Managers must retain a hard copy of **Job Performance Plans** signed by the **Reviewer** for file purposes.

Managers should provide employees without computer access a paper copy of their **Performance Plan** at the time of discussion.

This is a three-tier process:

- 1. Manager Modifies the Performance Plan**
- 2. Manager Makes Plan Available, Marks Discussion Held**
- 3. Manager Acknowledges and Completes Performance Plan**

Note: This is a summary of the steps found in the Edison PE training and is offered as a supplemental tool. It is not a substitute for that training which is available on the Edison home page, path:

Edison Support Information > HCM > Human Resources

1. Manager Modifies the Performance Plan

Go to: Manager Self Service> Performance Management>Performance Documents> Current Documents

Listed are the current performance documents for the employees you supervise. To complete a **Performance Plan**:

Select **Job Plan** (Document Type) for an employee

Click **Start**

Click **Add Major Job Responsibility**

Click in the **Title** field and type: **Performance Plan**

Click **Update (you will now see the Comments Section)**

Now enter the **expected performance standards** for this employee in the comments section. You may “copy/paste” Performance Plans from word documents.

Caution: Be sure to remove formatting of tabs prior to copying and pasting the content.

The Comments Section will hold up to 80 pages and will expand to view the information pasted by clicking **Available for Review**.

Click the **Spell Check** icon and make corrections if needed.

Click **OK**.

Click **Save**.

The Performance Plan is ready for review.

Manager presents a hard copy of the **Performance Plan** to the **Reviewer** for agreement.

If the **Reviewer** has indicated that modifications are needed to the **Performance Plan**, the **Manager** must modify the document.

Once the **Reviewer** has initially **approved** the document, the **Manager** can discuss the **Performance Plan** with the employee.

For detailed information regarding Performance Plan construction, sign up for the SMART Formula training course. See your agency Training Coordinator.

2. Manager Makes Plan Available, Marks Discussion Held

You received communication from the **Reviewer** that the **Performance Plan** is **approved**.

You have **discussed** the **Performance Plan** with the **Employee**.

Go to: Manager Self Service> Performance Management>Performance Documents> Current Documents

Click on **Job Plan** in the **Document Type** column.

Click the **Mark Available** link.

Click the **Available for Review** button. This will allow the **Employee** to view this **Performance Plan** using **Edison Self Service**.

Click **OK**

You are returned to the **Document Details** page.

Click **Mark Review Held**.

Click in the **Date of Discussion** field and enter the date you discussed the review with the employee.

Click **Review Held**

Click **OK**

The **Employee** can now navigate to the **Performance Plan** using **Edison Self Service** to **Acknowledge** the **Performance Plan**.

Note:

Managers must retain a hard copy of **Performance Plans** signed by the **Reviewer** for file purposes.

3. Manager Acknowledges (if necessary) and Completes Performance Plan

Using **Edison Self Service** the **Employee** should **Acknowledge** the **Performance Plan** if the discussion has taken place and Edison displays the correct **Date of Discussion**.


If the **Employee** is unable, fails or refuses to **Acknowledge** the **Performance Plan** in a timely manner, the **Manager** is required to **Acknowledge** the **Performance Plan** on behalf of the **Employee**.

Go to: Manager Self Service> Performance Management>
Performance Documents> Current Documents

Click on **Job Plan** in the **Document Type** column. The link will be:

- o **Acknowledge** if the **Employee** *has not* **Acknowledged** it.
- o **Complete** if the **Employee** *has* **Acknowledged** the **Performance Plan**.

Template name: Annual Review

Document Progress			
Step	Status	Due Date	
Complete Manager Evaluation	 Review Held	02/28/2009	View Acknowledge

(This sample shows the employee did not acknowledge the evaluation.)

- If the **Employee** *has not* **Acknowledged**, click **Acknowledge**.
- Click the **Acknowledge Review** button.

Note: Use **Manager Override** when the **Employee** is temporarily without computer access, thus unable to **Acknowledge** the **Performance Plan**. The **Manager Acknowledges** on the Employee's behalf.

<input checked="" type="radio"/> Manager Override	<input type="radio"/> Manager Override
<input type="radio"/> Employee Refused	<input checked="" type="radio"/> Employee Refused

Employee Refused should be selected when the **Employee** fails or refuses to **Acknowledge** a **Performance Plan** in a timely manner.

Important: The Employee Refusal option must not be selected without the prior approval of the Reviewer.

- Click the appropriate button.
- Click **OK** to **Acknowledge** the **Performance Plan**.

The **Complete** link is the last step in the **Performance Plan** process.

Click on the **Complete** link.

Click the **Complete** button.

Click the **Complete** button.

Click **OK**