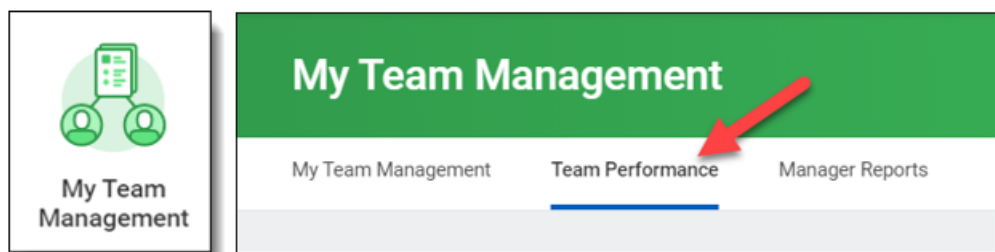


Completing a Performance Improvement Plan

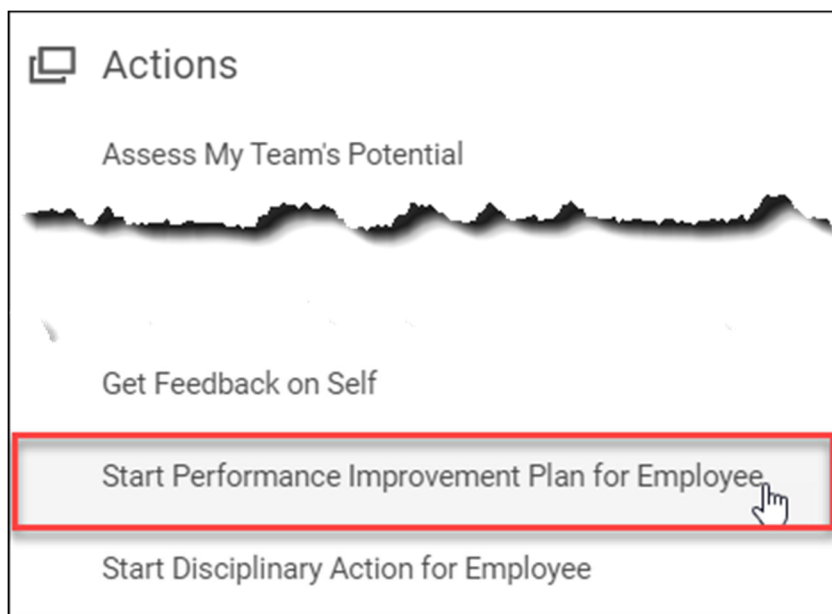
This job aid will walk you step by step on how to complete a performance improvement plan.

The performance improvement plan is a tool that provides direction for assigned duties, clarification of expectations for those responsibilities, and regular status of the planned activities. This plan should have a period start and end date reflecting the expected length of the plan, including follow-up dates. A second review will be initiated on the period end date to evaluate the success of the plan.

Step 1: On the *Home Screen*, click the **My Team Management** worklet, then click on the Team Performance tab.



Step 2: From the *Actions* menu, click **Start Performance Improvement Plan**.





Note: If this is a Plan Initiation, use the Initiation form and set the period start and end dates for the full length of time you expect this plan to be in effect.

If this is a Plan Update or Completion, use the update/finalization form and enter the same date range as used on the initiation form. Using a different date range will prevent previous content from populating the form.

Step 3: Complete the following fields.

1. In the *Employee* field, select the employee from the drop down menu.
2. In the *Review Template* field, select the plan template you will be using from the drop down menu.
3. In the *Period Start Date* field, select the start date of the plan from the drop down menu.
4. In the *Period End Date* field, select the end date of the plan from the drop down menu.
5. Click **Submit**.

The screenshot shows a form with four input fields and two buttons. Each field has a red circle with a number next to it. The fields are: 'Employee' (1), 'Review Template' (2), 'Period Start Date' (3), and 'Period End Date' (4). The 'Period Start Date' and 'Period End Date' fields have a calendar icon. Below the fields is a red circle with the number 5, pointing to the 'Submit' button. The 'Cancel' button is also visible.



Note: Any section with three dots and lines has a drop down with a list of available options.

Step 4: Complete the following sections.

1. In the *Performance Improvement Plan Details* section, list all key dates related to the plan (Initiation Date, Planned Meeting Dates, and Projected Review/Finalization Date).
2. In the *Performance Concern* section, describe the behavior or outcomes that resulted in the need for this plan. All issues that must be addressed to successfully close the plan must be noted here. If you have more than one concern, you should number the concerns to preserve the order.
3. In the *Outcome and Actions* section, describe the outcomes that will result in successful completion of the plan.
4. In the *Support* section, list support options available to the employee, and any recommendation on how/when to leverage them.

Performance Improvement Plan Details

[Guide Me](#)

Performance Improvement Plan Details

Add 1

Performance Concern

[Guide Me](#)

Performance Concern

Add 2

Outcome and Actions

[Guide Me](#)

Outcome and Actions

Add 3

Support

[Guide Me](#)

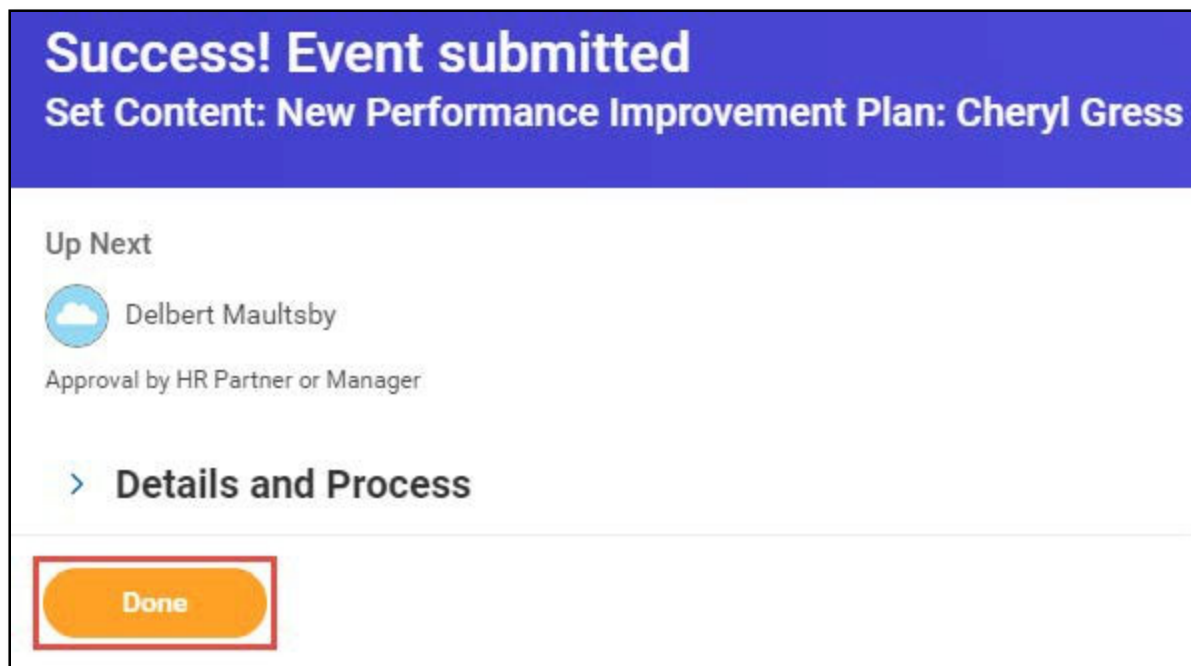
Support

Add 4

Step 5: Click **Submit**.







Step 6: A confirmation screen will appear. Click **Done**.



After submitting the evaluation it will go to your HR Partner who reviews and approves the performance improvement plan. The HR Partner can also add additional approvers if needed. Once the HR Partner approves it the employee will receive a request in their inbox to review and approve it. There is a section at the end where the employee can add comments on the contents of the performance improvement plan and to acknowledge they have received it. The employee may submit without comments if they are in agreement with the contents of the plan, however they must at least put their name in the comment box to signify they have received the plan.

Step 7: The manager will receive a request in their inbox to review and approve the employee's comments on the performance review plan. The manager can either click **Approved** or **Send it Back** to the employee.

Review



Self Evaluation: New Performance Improvement Plan: Marian Cox

Actions

20 second(s) ago - Due 06/02/2018; Effective 08/31/2018

Performance Improvement Plan Details

*
Work on developing Excel skills

Performance Concern

*
Need to be proficient in Excel to perform current duties on a daily basis

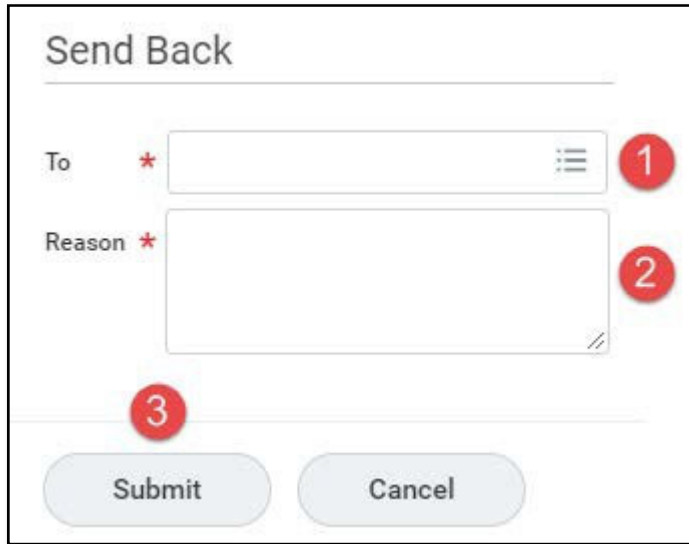
Approve

Send Back

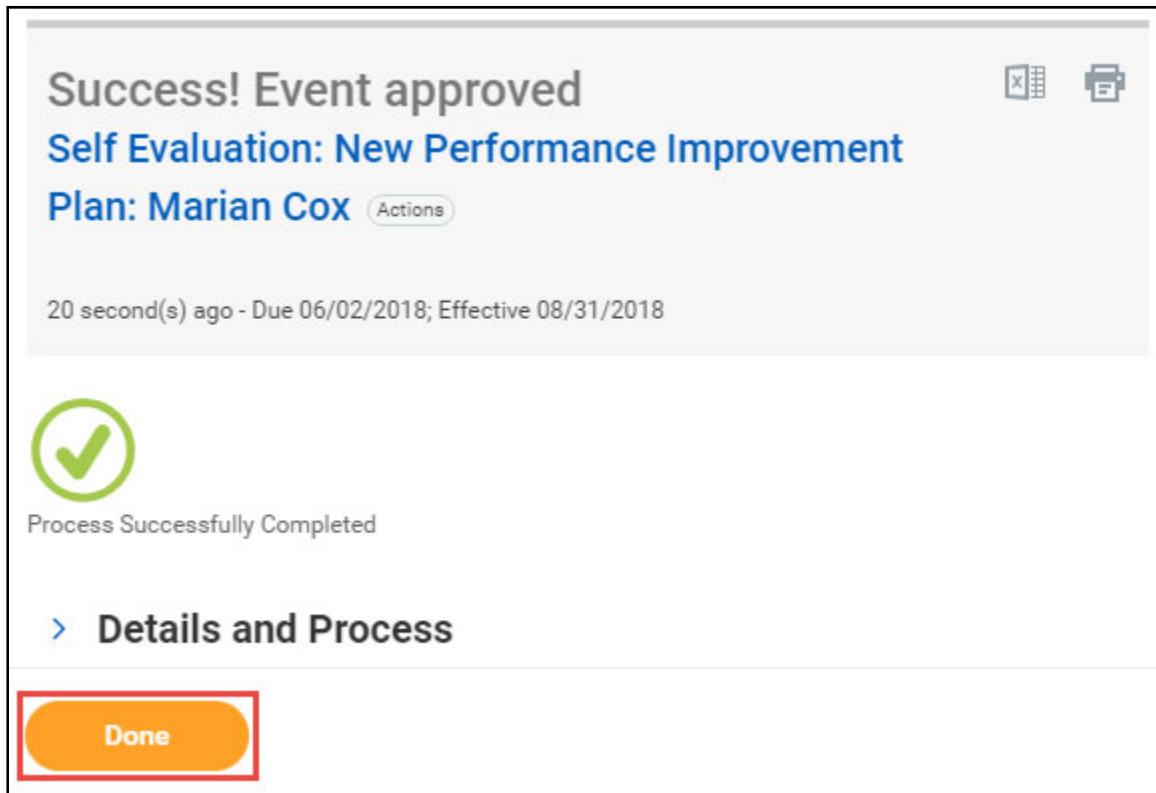
Close

Step 8: If the manager selects **Send Back**, a pop-up window will display and you will need to complete the following fields:

1. In the *To* field, verify it is the correct employee.
2. In the *Reason* field, type in the reason you are sending it back to the employee.
3. Click **Submit**. A notification will be sent to the employee and they can make changes to their comments and resend it.

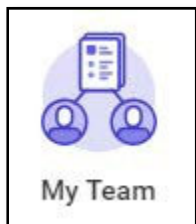
A screenshot of a 'Send Back' pop-up window. The window has a title bar 'Send Back'. Below the title bar, there are two input fields. The first field is labeled 'To' with a red asterisk and a dropdown menu icon; it has a red circle with the number '1' next to it. The second field is labeled 'Reason' with a red asterisk and a text area; it has a red circle with the number '2' next to it. At the bottom of the window, there are two buttons: 'Submit' and 'Cancel'. The 'Submit' button has a red circle with the number '3' above it.

Step 8: You will receive a confirmation that the process has been completed. Click **Done**.

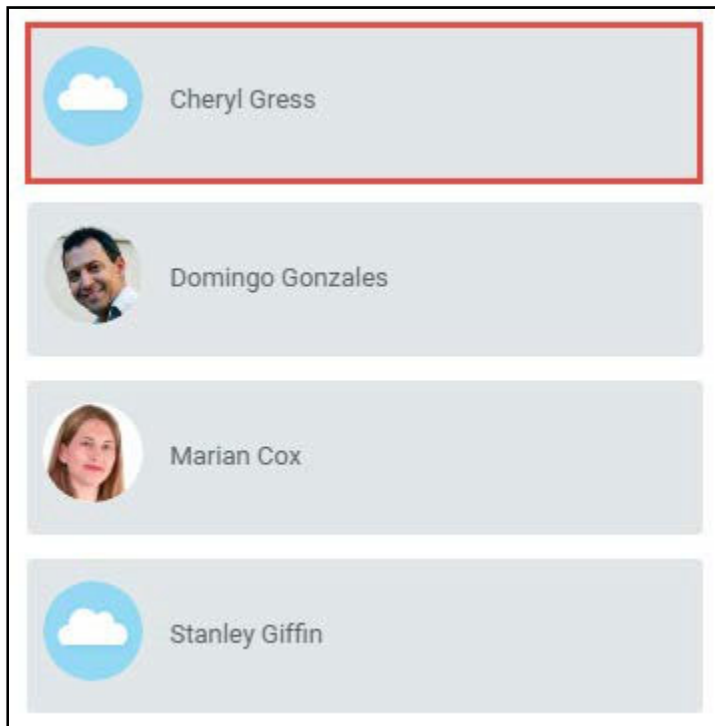


You can view or print the performance improvement plan.

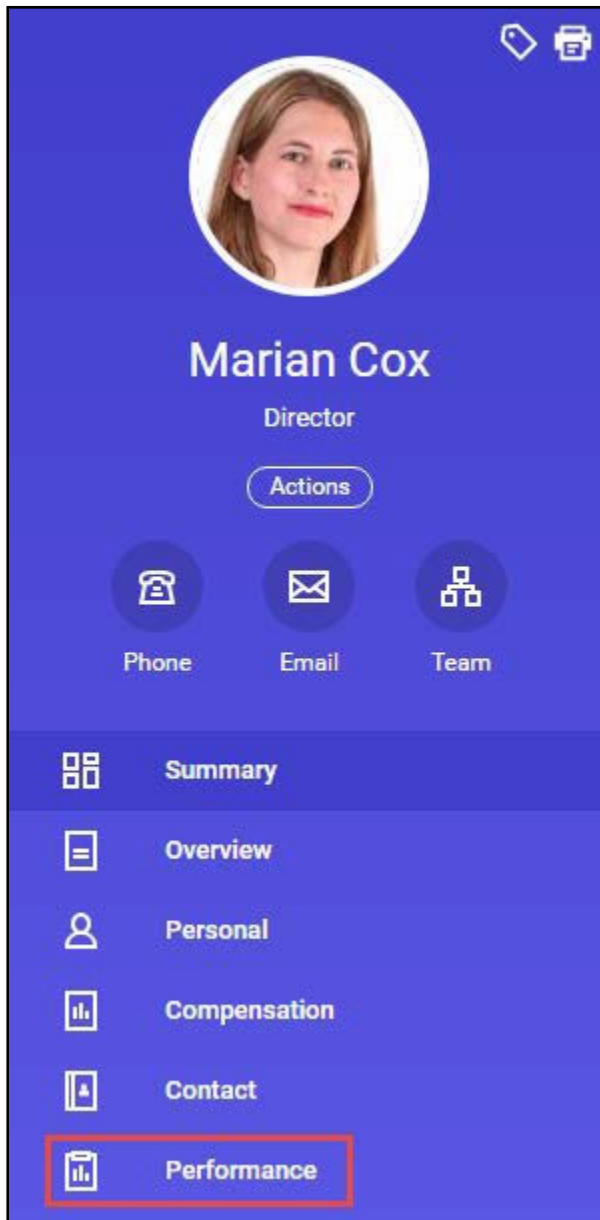
Step 9: On the *Home* page, click the **My Team** worklet.



Step 9: Click on the name of the employee you want to view their performance improvement plan.



Step 10: Click **Performance**.



Step 11: Click on **Performance Improvement Plans** and **View**.

Individual Goals Performance Reviews Development Plans **Performance Improvement Plans**

Completed 1 item



Review	Review Period			
	Start Date	End Date		
New Performance Improvement Plan: Marian Cox	05/31/2018	08/31/2018	View	Create New PDF

To update or close the performance improvement plan **complete steps 1 through 3.**

This plan should have the same dates as the initiation plan. If you need to extend beyond the initial Period End Date, close out this plan and start a new plan. Content will only carry forward if you do not introduce new dates.

The performance plan is a tool that provides direction for assigned duties, clarification of expectations for those responsibilities, and regular status of the planned activities. A second review will be initiated on the period end date to evaluate the success of the plan.



Note: Since you are updating or completing a performance improvement plan, make sure to use the update/finalization form and enter the same date range as used on the initiation form. Using a different date range will prevent previous content from populating the form.


Step 12: You will receive a confirmation and it will be sent to the employee. Click **Done**.

Start Performance Improvement Plan Confirmation

Review/Finalize Performance Improvement Plan: Marian Cox

Actions

Up Next

Marian Cox

Self Evaluation: Review/Finalize Performance Improvement Plan: Marian Cox - Review Plan

Due Date 06/07/2018


> Details and Process

Done

The employee will now have a comment box for each of the sections. They can provide any comments, changes or corrections in the box provided. Both employees and managers have a comment box for this purpose.

1. In the Plan Details section, the employee should provide comments on key dates related to the plan (Initiation Date, Planned Meeting Dates, and Projected Review/Finalization Date), and whether meetings have occurred.
2. In the Performance Concern section, the employee should describe how the behavior or results have improved. All issues must be addressed to successfully close the plan.
3. In the Outcome/Improvement section, the employee should describe the outcomes that have been achieved, and whether they meet the expectations to mark the plan as successfully complete.
4. In the Result section, the employee should provide overall/summary comments. The manager will determine if the plan has been successfully completed in this section, using the scale provided.

Step 13: Once the employee submits their self-evaluation the manager will receive a request in their inbox to evaluate the progress of the employee. The manager will answer the same items listed above. Once complete, click **Submit**.



Complete Manager Evaluation

Manager Evaluation: Review/Finalize Performance Improvement Plan: Marian Cox [Actions](#)

Review Period
05/31/2018 - 08/31/2018

29 second(s) ago - Due 06/07/2018; Effective 08/31/2018

IMPORTANT: This plan should have the same dates as the initiation plan. If you need to extend beyond the initial Period End Date, close out this plan and

Performance Improvement Plan Details

[Guide Me](#)

Performance Improvement Plan Details

*
Work on developing Excel skills [Edit](#)

Manager Evaluation

Comment

Employee Evaluation

Comment
My manager and I met to review the plan and action steps. We have meet again to give an update on my progress.

[Add](#)

[Submit](#) [Send Back](#) [Save for Later](#) [Close](#) [Guide Me](#)

Step 14: You will receive a confirmation that the process is complete. Click **Done**.


Success! Event submitted

Manager Evaluation: Review/Finalize Performance Improvement Plan: Marian Cox

Actions

29 second(s) ago - Due 06/07/2018; Effective 08/31/2018

Up Next



Report: Performance Review Printout

> **Details and Process**


Done

Step 15: You will be notified that a printable document is available. Print the document and schedule a time to meet with your employee to go over it.

Document Available

2 minute(s) ago

Performance Review Printout 2018-05-31 18_06 PDT.pdf is now available in My Reports

Details  [Performance Review Printout 2018-05-31 18_06 PDT.pdf](#)

Step 16: You will receive a request in your inbox to meet with your employee and review the plan. Once you met with your employee, click Submit.

Complete To Do **Meet with Employee to Review Plan** Actions ☆ 📄 🖨 ⚙ 🗑

4 minute(s) ago - Effective 08/31/2018

For [Marian Cox](#)



Overall Process [Review/Finalize Performance Improvement Plan: Marian Cox](#)

Overall Status In Progress

Due Date 06/14/2018

Instructions Instruction text here

1 item 📄 ☰ 📄 🗑

File Name	Type	File	Created by	Date and Time Created	
 Performance Review Printout 2018-05-31 18_06 PDT.pdf	Business Form (PDF)		Lisa Olivar	05/31/2018 06:06 PM	Delete

Submit Save for Later Close

Step 17: You will receive a confirmation that you have marked the evaluation complete. Click **Done**.


You have marked as Complete

Manager Evaluation: Review/Finalize Performance Improvement Plan: Marian Cox

Actions

4 minute(s) ago - Effective 08/31/2018

Up Next

Marian Cox

Acknowledge and Comment

Due Date 06/02/2018


> **Details and Process**

Done

The employee will receive a request in their inbox to do a final acknowledgment and comments to finalize the plan. The employee's acknowledgment only confirms that the plan results have been discussed with them.

Step 18: You will receive a request in your inbox to do a final acknowledgment and comments to finalize the plan.

1. In the *Status* field, select **Acknowledge**.
2. In the *Comments* field, type in any additional comments you may have.
3. Click **Submit**.



Provide Manager Review Comments

Manager Evaluation: Review/Finalize

Performance Improvement Plan: Marian Cox

Actions

Review Period
05/31/2018 - 08/31/2018

Evaluated By [Lisa Olivar](#)


35 second(s) ago - Due 06/02/2018; Effective 08/31/2018

Acknowledgment






Manager Feedback

Manager Acknowledgment

Status *

 1

Comment

Format  **B** *I* U A     2

3

Submit

Save for Later

Close


Step 19: You will receive a confirmation that the process has been completed. Click **Done**.

Success! Event submitted

Manager Evaluation: Review/Finalize Performance Improvement Plan: Marian Cox

Actions

35 second(s) ago - Due 06/02/2018; Effective 08/31/2018



Process Successfully Completed

> Details and Process

Done