# PY 2024-25 Talent / Performance Management

**Human Resources Department** 

Organization & Employee Development Division



**Training Goal** 

Learn how to effectively complete an annual performance document

Performance Year (PY) 24-25 Performance Review Process



### Learning Objectives

At the end of this session, participants will:

Recognize CV360 performance terminology

Understand individual roles in the talent/performance process

Develop skills to create an Anytime Document in CV360

Be able to coach employees on completing the Anytime Document

Review process to create Check-in Document in CV360

Understand the Talent Coordinator role in performance process

### **CV360 Talent/Performance Terminology**



#### **Terminology**



| CV360 Terminology                                    | Definition   |
|--|--|
| Review Period<br>(April 1st – March 31st)            | Annual evaluation period designated for managers to establish performance expectations/goals and measure results in collaboration with their direct reports  |
| Goal Plan  | Applicable performance year for the evaluation period (e.g., Annual Goal Plan 2024)  |
| Organizational Goals (Formerly strategic priorities) | Goals set by the CEO in alignment with each budget cycle to provide employees the priorities for the performance year  |
| Department Goals                                     | Goals set by each department head to help achieve results in targeted areas designated as administration priorities  |
| Performance Goals                                    | Goals assigned or aligned to individual employees or job classes   |
| Anytime Document                                     | Document used in the performance planning and evaluation process to identify goals, key performance indicators, ratings, etc.  |
| Check-in Document                                    | Document used to provide ongoing performance feedback consisting of an optional employee questionnaire (self-evaluation), manager questionnaire (provision of feedback to employee), general discussion topics and manager's approval status |
| Questionnaire  | Portion of a CV360 document that allows user to enter customized information   |
| General Discussion                                   | Key areas of discussion for improvement or targeted goal achievement   |

#### Roles



| CV360 Roles                                    | Definition  |
|--|---|
| Talent Administrator (HR Staff only)           | Handles countywide performance/talent management admin functions to include setup and transactional access                              |
| Talent Coordinator (Department Head Designees) | Setup department goals and have administrative access to push tasks forward and backwards, and role delegation                          |
| Line Manager                                   | Manage/supervise other employees  |
| Talent Manager                                 | Manages performance evaluations for employees in place of the line manager (who provides the daily supervision for business operations) |

| Administrative Role | Definition  |
|---------------------|---|
| Talent Liaison      | Serves as point of contact to HR for purposes of overseeing the performance management function and designated by the department head  Note: Administrative role only (does not have CV360 access rights for Talent Management)  & may be a manager or Talent Coordinator |
| Talent Approver     | Designated department final reviewer and approver in evaluation process (department director may delegate this responsibility to a designee in a leadership position such as deputy director, general foreman, superintendent, etc.)                                      |





#### ORGANIZATIONAL GOALS

- ✓ County's strategic priorities established by the CEO annually in February
- ✓ Added in CV360 by Innovation & Technology Department no later than March 15<sup>th</sup> each performance cycle



## Performance Evaluation Anytime Document Process





- Anytime Document allows the line/talent manager to provide constructive feedback about the employee's performance, and to focus on progress toward goals
- Employees acknowledge receipt of the Anytime Document
- CV360 records the date of the Anytime Document completion

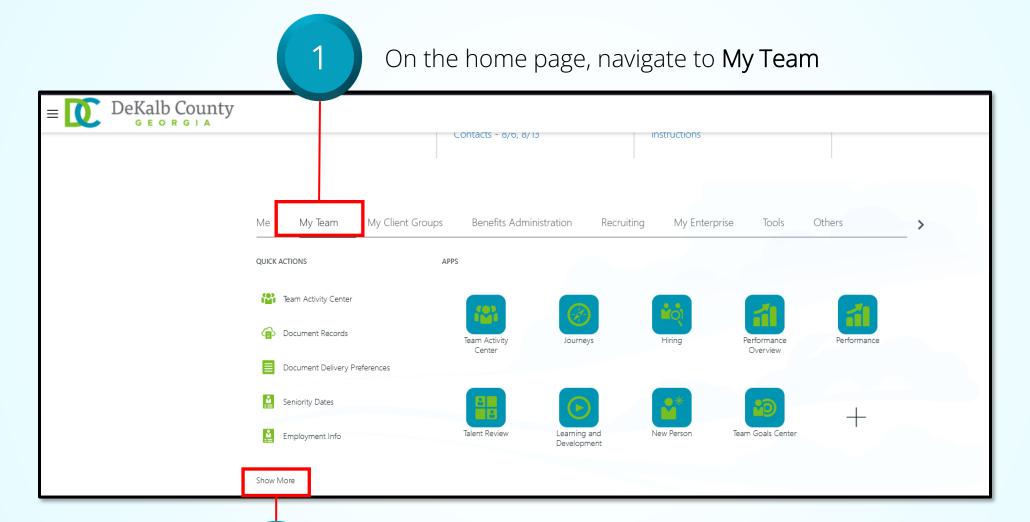


The Anytime Document is the authorized performance document for PY2024-25.

# The Anytime Document Process

- Manager creates Anytime Document for each individual employee at beginning of performance year (ideally between 3/1 - 4/30)
- Manager completes Manager
   Questionnaire to provide constructive feedback and comments on employee progress towards goals
- At the end of performance year, Manager completes evaluation in consultation with Talent Approver and submits Anytime Document
- Employee completes the Employee
   Questionnaire acknowledging receipt of
   Performance Evaluation and submits
   Anytime Document





2 Select Show More



Career and Performance



Add Anytime Document



Add Check-In Document



Add to Talent Pool



All-in-One Evaluations



Create Succession Plan



Evaluate Performance



Goals Center



Performance



Select the **Performance** Quick Action

from the

Career and Performance section

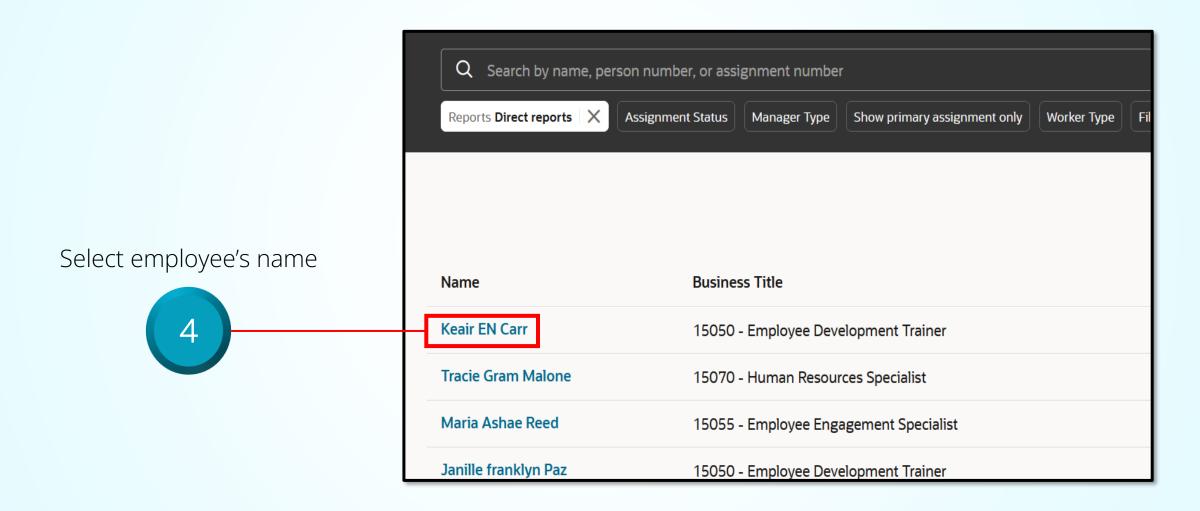


Skills and Qualifications



Succession Organization Chart





#### **Troubleshooting**







If an employee name does not appear

-or-

If a former employee's name is included in the current list

Contact your Department Admin/Payroll Coordinator for assistance to update hierarchy changes.





From the **Performance Documents** page, select the **+Add** button



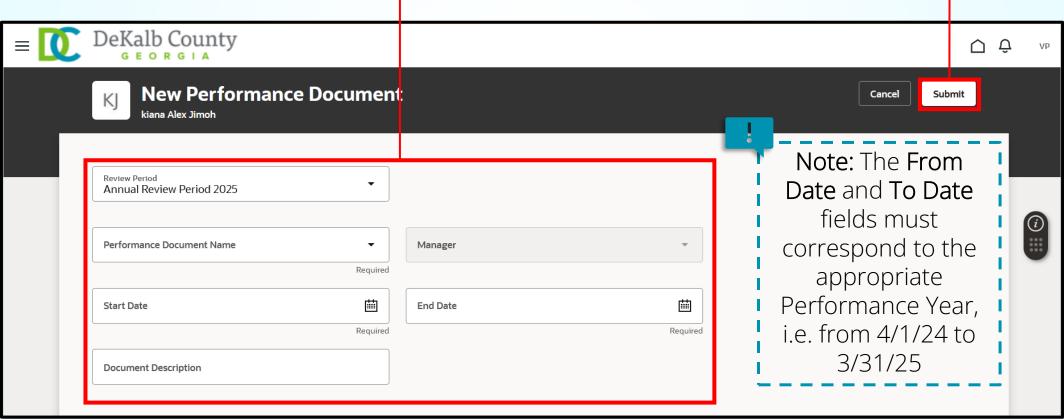


Choose the Review Period, the Performance Document Name and the Manager

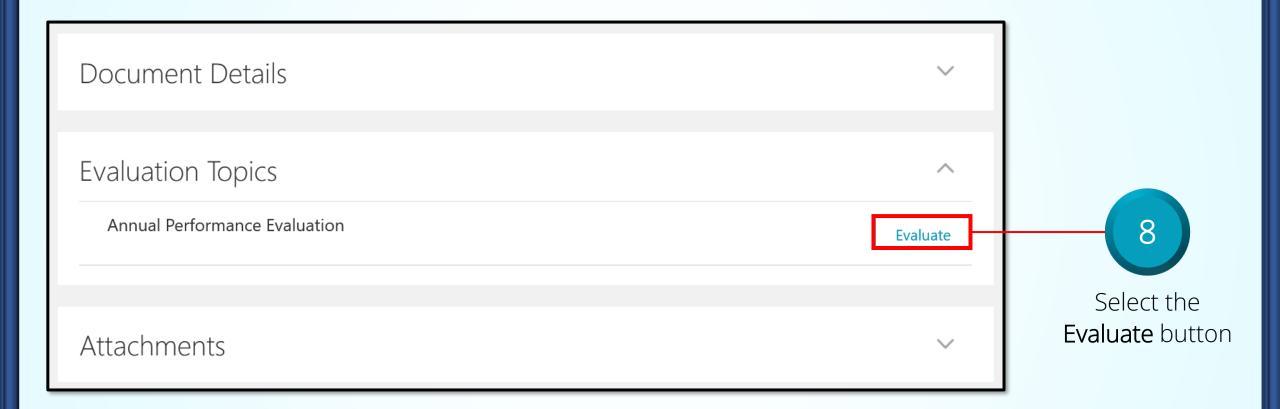


Select the **Submit** button

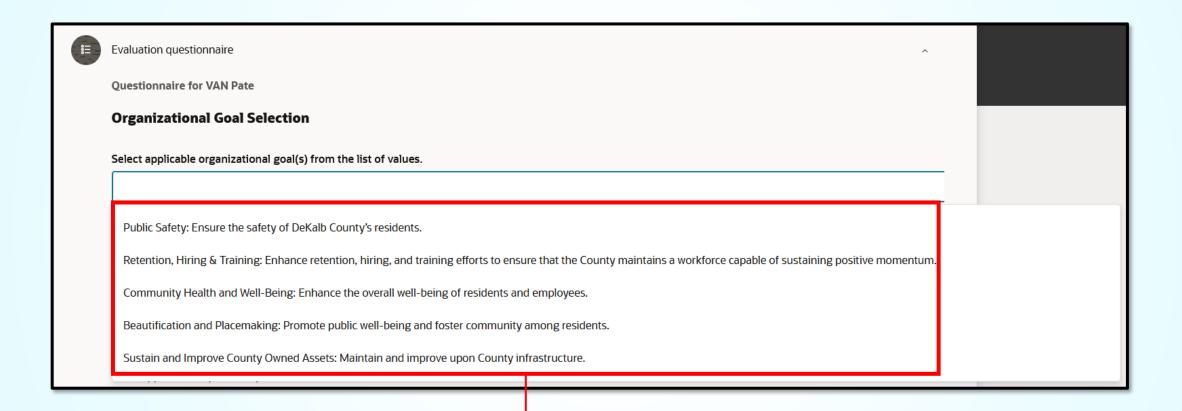












9

From the list of values, select the applicable organizational goals.





Enter applicable Department/Division Goals.

10

Manually enter department goals in the text box (free text or copy/paste)



Note: The department goals mass upload functionality is not available.



11

Enter the applicable goal and key performance indicators, select the appropriate Goal Status, enter Comments and select the appropriate

Goal Rating

Repeat for each
Performance Goal
(allowed a maximum of 5)

| Performance Goal 1   |
|--|
| Goal: Enter applicable goal and key performance indicators |
|  |
|  |
|  |
| Goal Status  |
|  |
|  |
| Comments   |
|  |
|  |
|  |
|  |
|  |
| Goal 1 Rating  |
|  |
|  |

#### **Rating Instructions**

Employees *must* receive a performance rating at the end of the annual review period.

Option #1: Rate individual goals only Note: Do not complete an overall rating.

Option #2: Complete the overall rating only Note: Do not rate the individual performance goals.

DO NOT USE BOTH!
Check with your department head for the authorized option.





12

If authorized to use the individual performance goals **Rating** option, select the appropriate **Rating** for the performance goal.

Select N/A for the Overall
Rating option if authorized
to use the individual
performance goals
Rating option.

Distinguished **Exceeds Expectations** Meets Expectations Needs Improvement Does Not Meet Expectations N/A



13

If authorized to use the Overall Rating option, select the appropriate **Rating** for the employee.

Select **N/A** if the Overall Rating option is not authorized.

| Overall Rating             |  |  |
|----------------------------|--|--|
| Overall Rating             |  |  |
|                            |  |  |
| Distinguished              |  |  |
| Exceeds Expectations       |  |  |
| Meets Expectations         |  |  |
| Needs Improvement          |  |  |
| Does Not Meet Expectations |  |  |
| N/A                        |  |  |



General Discussion Topics



Enter information in the **General Discussion Topics**section, and upload any supporting documentation

| General Discussion Topics                |
|--|
| General Discussion Topics/Comments       |
|  |
|  |
|  |
|  |
| Drag and Drop Select or drop files here. |
| Sector of the principle.                 |
| URL                                      |



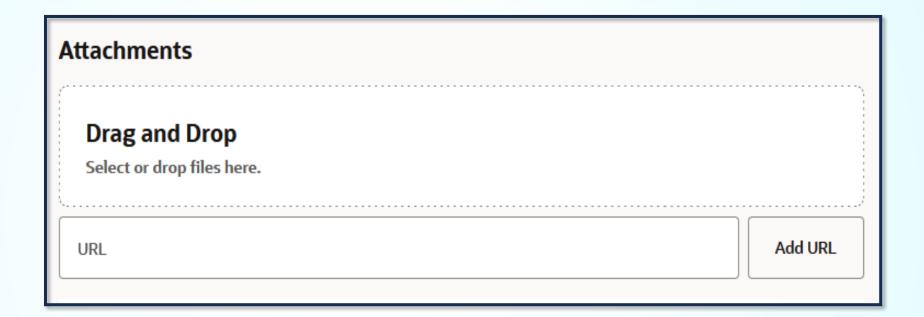
Examples: special projects, specific issues, etc.

Adding Attachments



15

In the Attachments section, upload any supporting documentation then select **Save** 





Examples: previously completed manual evaluations, etc.



16

At the bottom of the page, select **Save and Close** 

Save and Close Cancel

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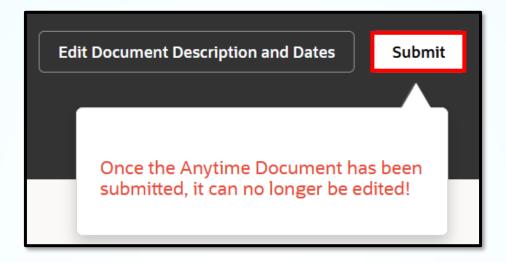
#### Note:

Selecting **Save and Close** saves the document for ongoing editing until it is submitted.

Selecting **Cancel** does not auto save any changes.



Completing the Performance Evaluation



17

At the top of the page select **Submit** 



Note: Once the Anytime Document has been submitted, it can no longer be edited!

#### **Employees: >90 Under Supervision**





If you have supervised the employee for fewer than 90 days, evaluation documentation must be provided by their previous supervisor. If the previous supervisor is no longer with the county, that supervisor's manager will need to provide documentation.

Contact the appropriate supervisor/manager and ask them to provide supporting documentation to be added to the evaluation document.

Then complete the performance evaluation using the Anytime Document Process.

#### **Employee:** > 90 days employed with County as of 3/31





If an employee has been employed with the county less than 90 days, the evaluation process may be completed using the Annual Check-In Document to provide feedback in lieu of the Anytime document.

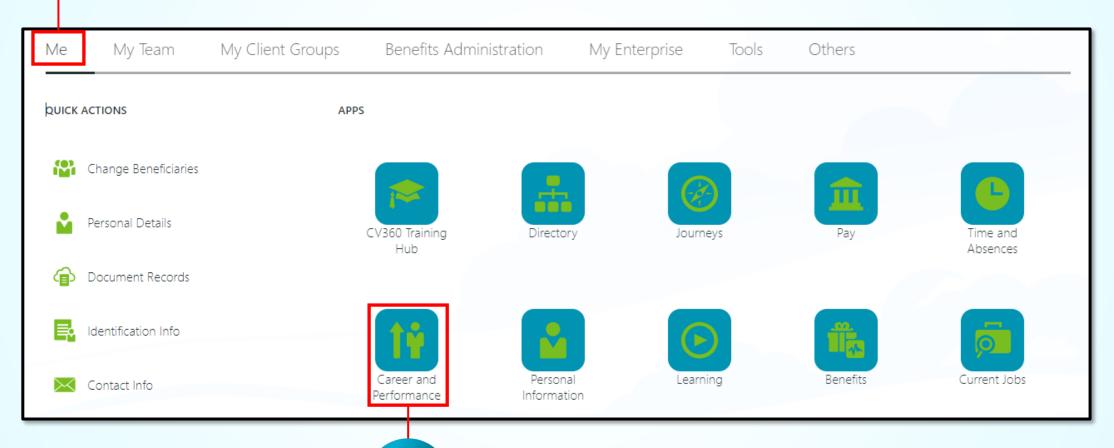
## How an Employee Completes the Anytime Document: Employee Questionnaire





1

On the home page, navigate to the **Me** Tab



Select the **Career and Performance** tile





#### **Skills and Qualifications**

Build your talent profile by adding skills and qualifications.



#### Goals

Set and manage performance goals.



Select the **Performance** card



#### Performance

View performance documents and complete related tasks.



#### **Talent Ratings**

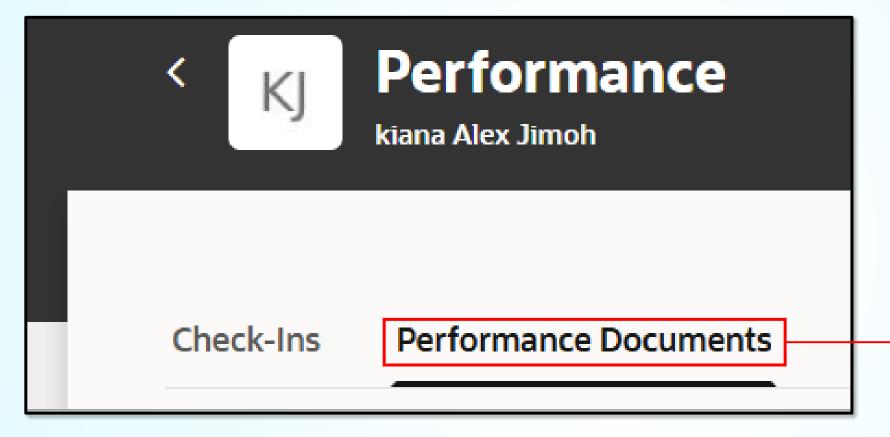
Set and manage talent assessments



#### Feedback

View or request feedback about yourself.





On the Performance page, select Performance
Documents





5

In the **Performance Documents** section, select the Anytime Document to be completed

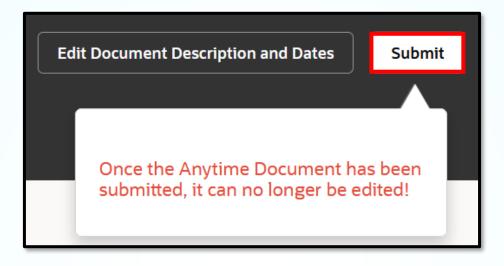


Questionnaire for kiana Alex Jimoh Select **Yes** from the drop-down **Employee Response** I acknowledge receipt of my performance feedback/evaluation. Yes Comments Add any comments in the Comments field 8 Select Save and Close Save and Close Cancel

#### **Acknowledging an Anytime Document**



Completing the Performance Evaluation



9

At the top of the page select **Submit** 



Note: Once the Anytime Document has been submitted, it can no longer be edited!

## **Employee Declines to Acknowledge Receipt**



# If an employee declines to acknowledge receipt...



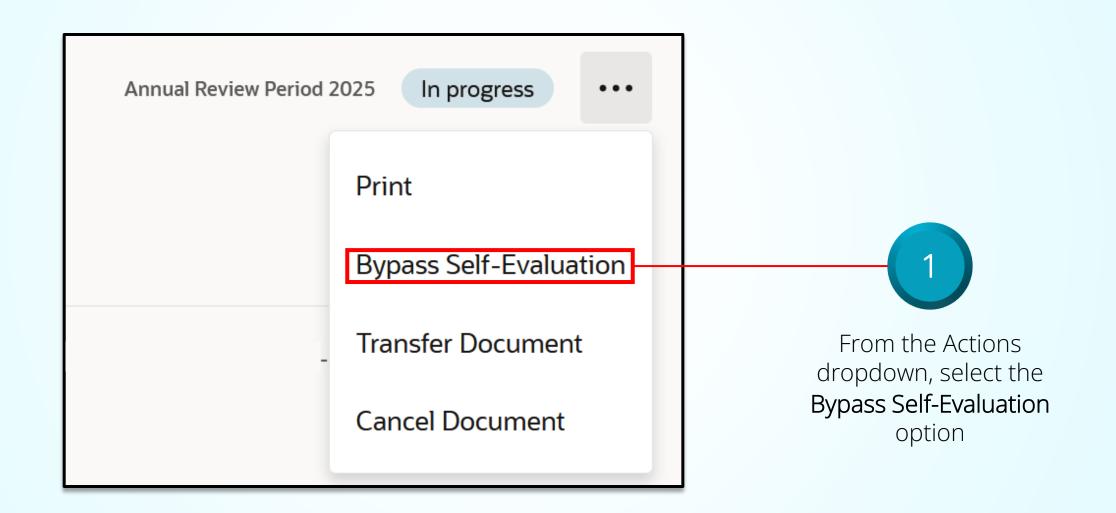
- Create a Check-In Document to document reason
- Utilize another manager within your department, equal or higher in paygrade, to witness the refusal
- Document the following in the General Discussion topic section as follows:
  - Refusal occurred (Insert date, time and location of performance meeting)
  - (Insert employee first & last name) Insert employee ID number, evaluation review meeting was held on (insert date) and he/she declined to acknowledge receipt of performance feedback/evaluation. Employee's refusal was witnessed by (insert name, ID number)
- Return to the Anytime Document and select
   Bypass Self-Evaluation

Note: Feedback fields are pre-determined and can not be amended. The General Discussion Topics section will allow managers to add topics relevant to the current performance periods.

#### **Employee Declines to Acknowledge Receipt**



After creating the Check-In Document, select Bypass Self-Evaluation







- Check-In Documents allow the employee and line/talent manager to have a 1-on-1 documented, ongoing, digital conversation about performance
  - Questionnaires (CV360 feedback process) are completed to help the employee and manager frame the discussion
- Employees and line managers are responsible for coordinating with each other to schedule check-ins before the end of the performance cycle
- Check-In Documents may be used for probationary evaluations
- CV360 records the date of the Check-In



The Check-In Document is used to record ongoing performance conversations.

# The Check-In Document Process



- Manager creates the Check-In document for the employee.
- Employee completes *Employee Questionnaire* to provide their perspective.
- Manager completes Manager Questionnaire to provide constructive feedback to employee.
- The Check-In may be updated/modified at any time during the performance year.

Note: Feedback fields are pre-determined and can not be amended. The General Discussion Topics section will allow managers to add topics relevant to the current performance periods.



On the home page, navigate to My Team

DeKalb County

GEORGIA

Contacts - 8/0, 8/13

Instructions

My Team My Client Groups Benefits Administration Recruiting My Enterprise Tools Others

QUICK ACTIONS APPS

Development

Overview

2 Select Show More

Document Records

Seniority Dates

Employment Info

Show More

Document Delivery Preferences



Career and Performance



Add Anytime Document



Add Check-In Document



Add to Talent Pool



All-in-One Evaluations



Create Succession Plan



Evaluate Performance



Goals Center



Performance



Select the **Performance** Quick Action

from the

Career and Performance section

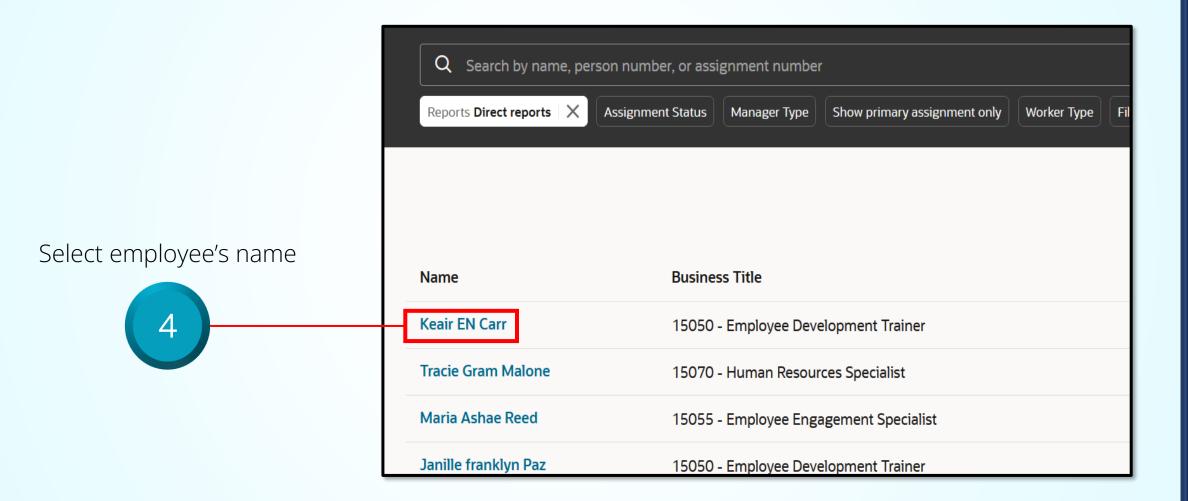


Skills and Qualifications



Succession Organization Chart





#### **Troubleshooting**







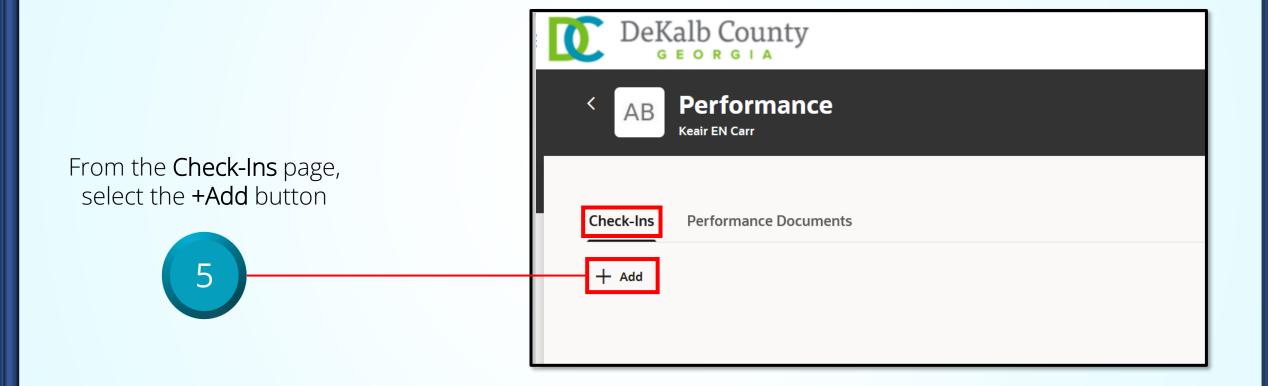
If an employee name does not appear

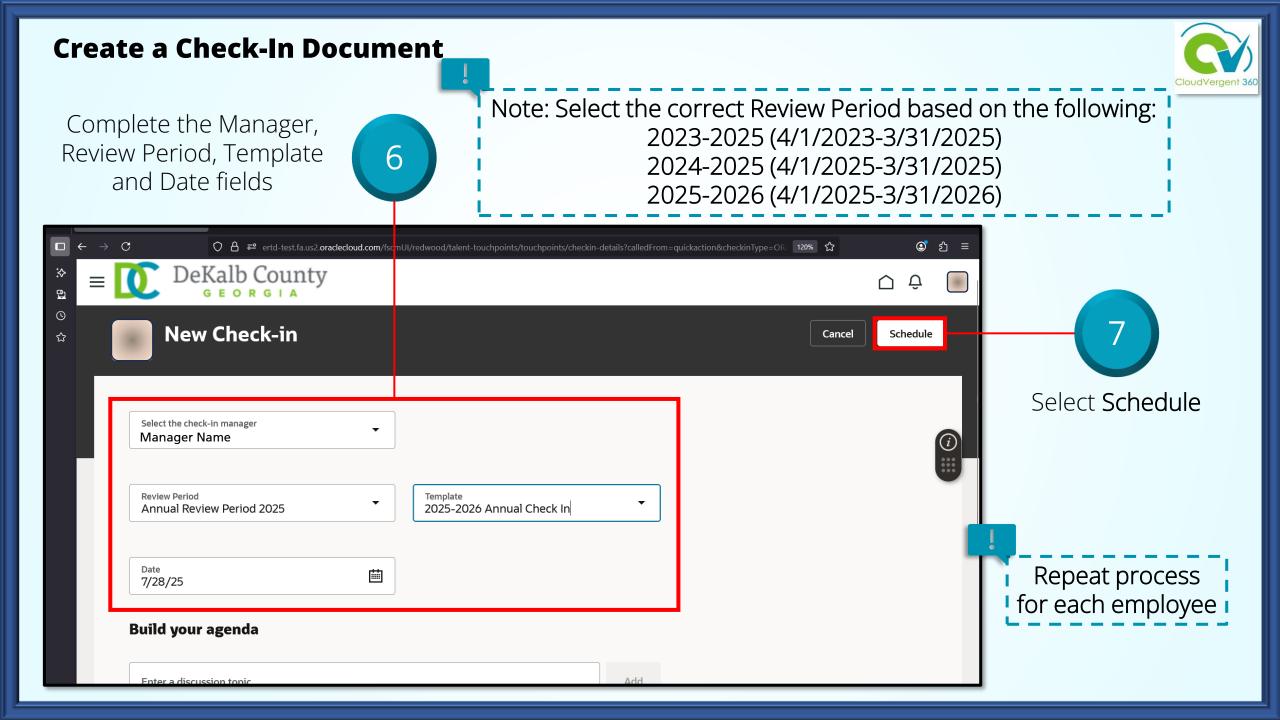
-or-

If a former employee's name is included in the current list

Contact your Department Admin/Payroll Coordinator for assistance to update hierarchy changes.

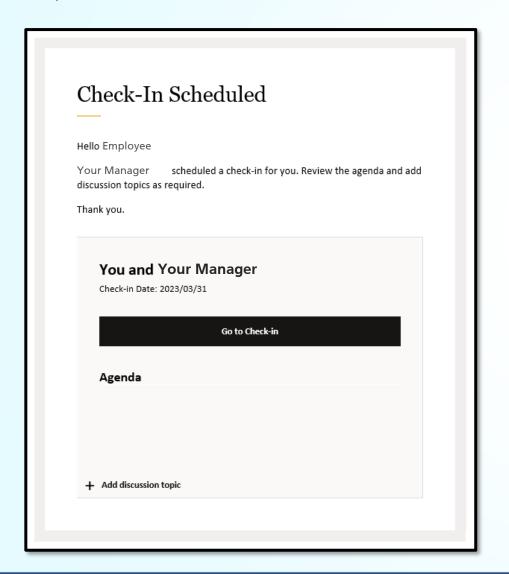








Upon creation of the Check-In Document, CV360 automatically generates two notifications to employee



Note: CV360 does not create a scheduled event, and the Agenda function is NOT enabled

#### **Check-In Document Created**

Hello, Employee

Your Manager created your PY 2025-26 Performance Document. comments.

Review and add any

Thank you.

Review Period

Check-In Date

Check-In Template

Go to Check-In document: PY 2023-24 Performance Document.





On the home page, navigate to My Team

DeKalb County

GEORGIA

Contacts - 8/0, 8/13

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QUICK ACTIONS APPS

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Performance



Select the **Performance** Quick Action

from the

Career and Performance section

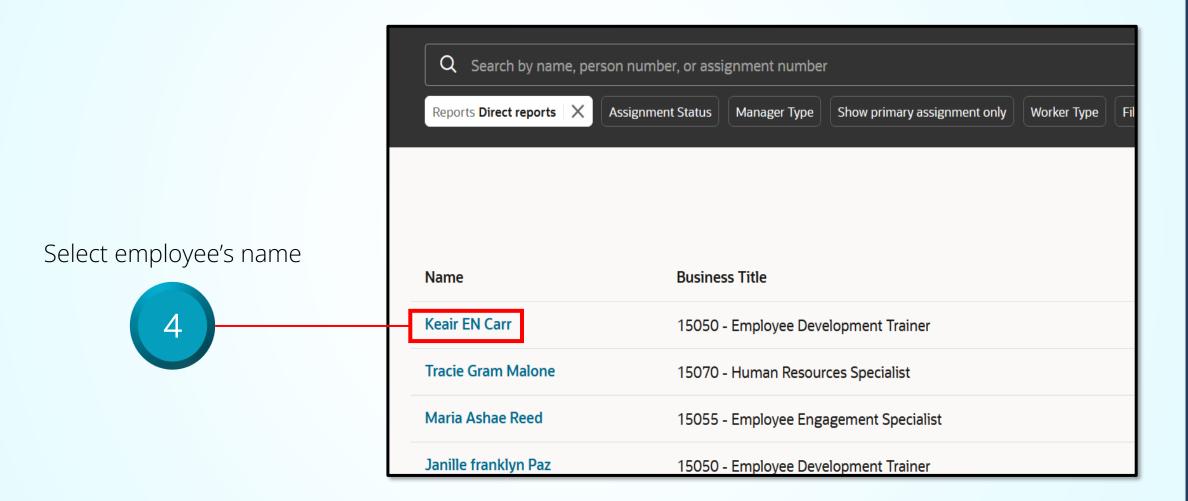


Skills and Qualifications

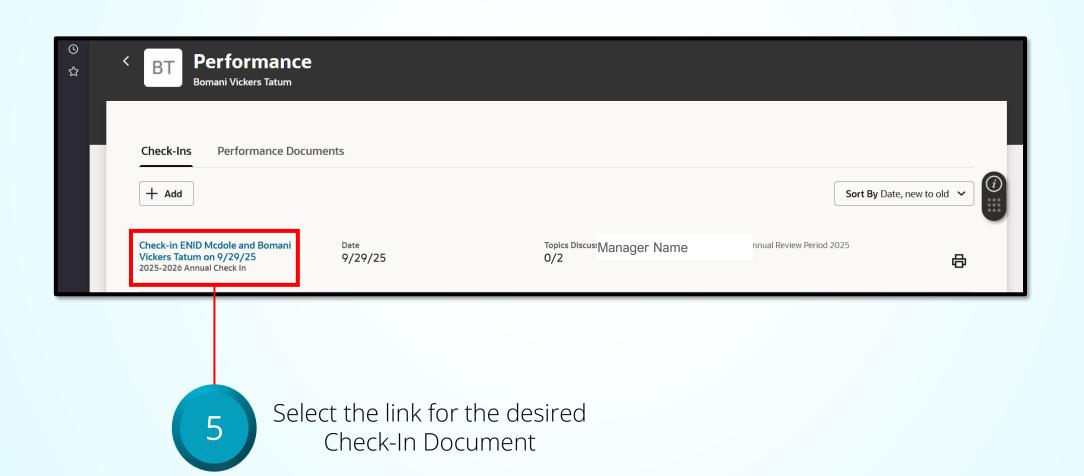


Succession Organization Chart

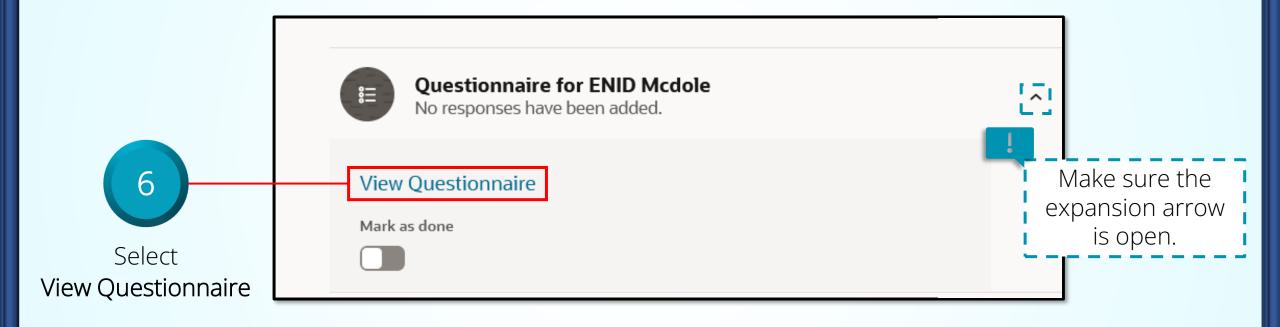








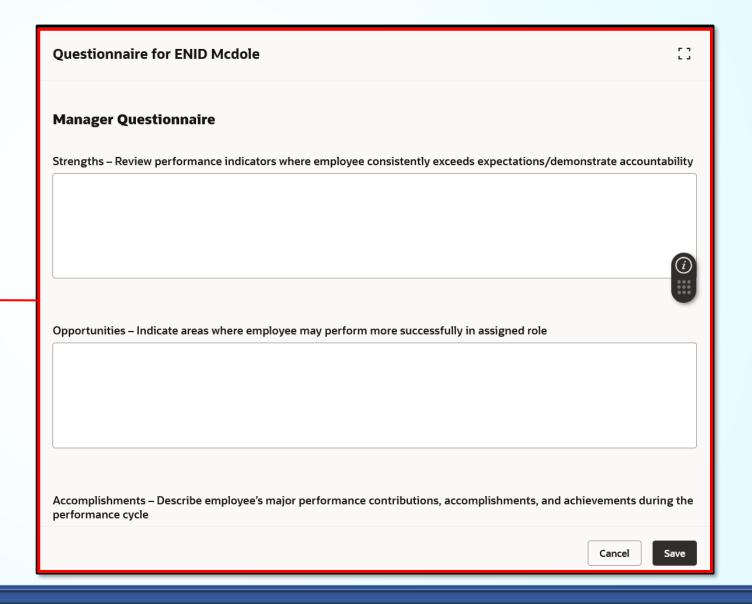




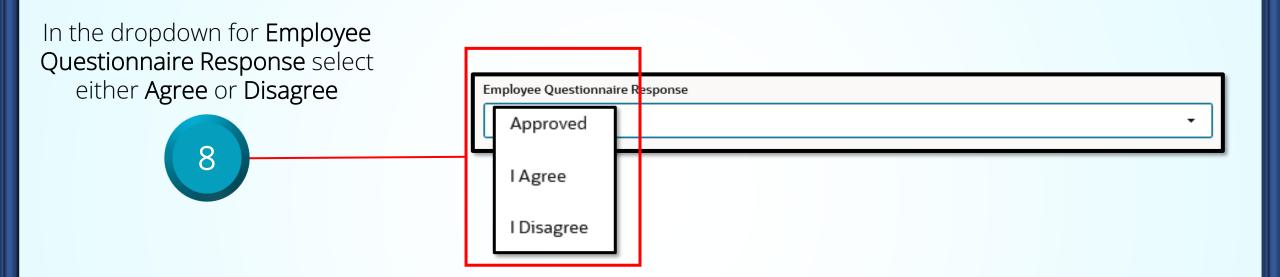


Enter the appropriate comments in the Strengths, Opportunities,
Accomplishments, Developmental Goals and Career Goals fields; then select Save









If the employee completes the self-evaluation, select either **Agree** or **Disagree**. Comments can then be added in the Comments field.

Use the **Approved** option only when the employee does not complete the self-evaluation. Add a comment in the **Other Comments** field.



If the employee does not complete the employee questionnaire (self-evaluation), **manager must** enter one of the following comments in the **Other Comments** field to close out the performance review:

- Employee was not required to complete the self-evaluation based on job classification.
- Employee opted not to complete the self-evaluation.
- Employee did not complete the self-evaluation by due date.
- Employee has been employed less than 90 days prior to the end of the performance cycle.
- Employee has not been supervised by the current supervisor a minimum of 90 days.

| Other Comments |  |  |
|----------------|--|--|
|                |  |  |
|                |  |  |
|                |  |  |





Questionnaire for ENID Mcdole

Responses have been added.

View Questionnaire

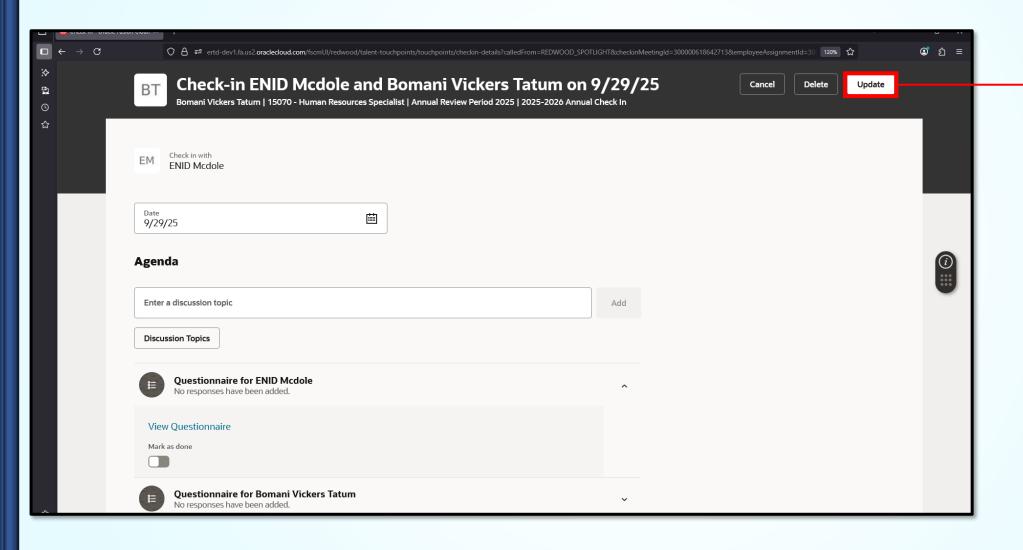
Mark as done



9

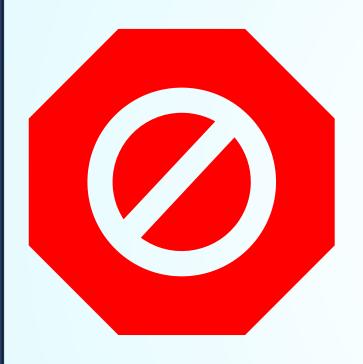
To close the Check-In Document, select the Mark as done slider





Select the **Update** button

#### **IMPORTANT!**



- Check-In Documents are not to be deleted!
- Only Talent Administrators can remove a Check-In document. To request the removal of a document send an email to HRTalent@dekalbcountyga.gov.
- Employees and managers must use the Update process!

**NEVER use the Delete button!** 

#### **Development Plan (formerly Performance Improvement Plan)**

- Accessed via Skills and Qualifications
- Currently unavailable in CV360 being assessed for functionality
- Interim process
  - Email <u>HRTalent@dekalbcountyga.gov</u> to request manual form
  - Contact Fabienne Niles, OED Manager, for guidance

## Talent Coordinators: How to Verify Submission of Performance Documents



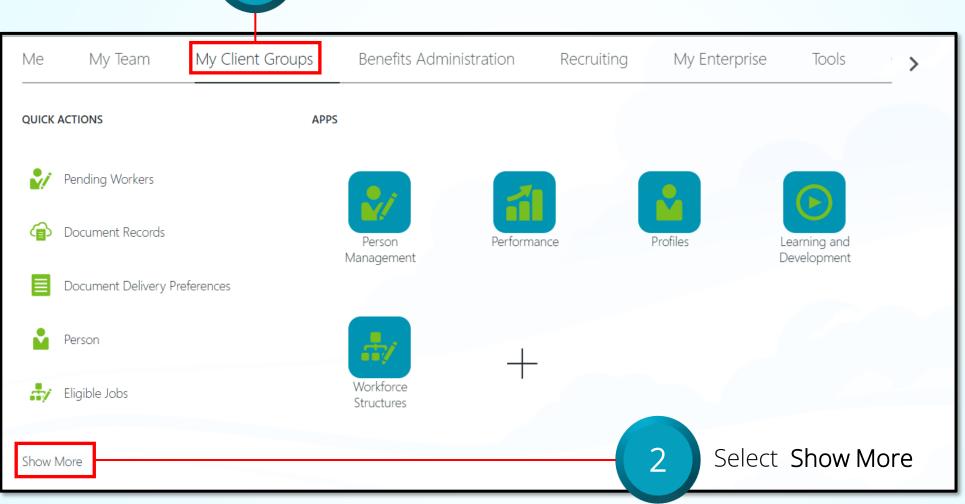




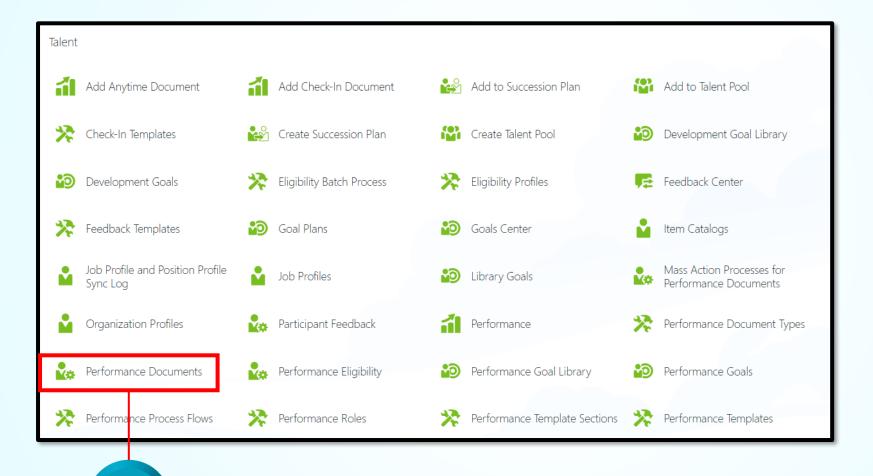
Payroll/Absence Coordinators serving as Talent Coordinators have access to view Performance Documents.



On the home page, navigate to the My Client Groups Tab

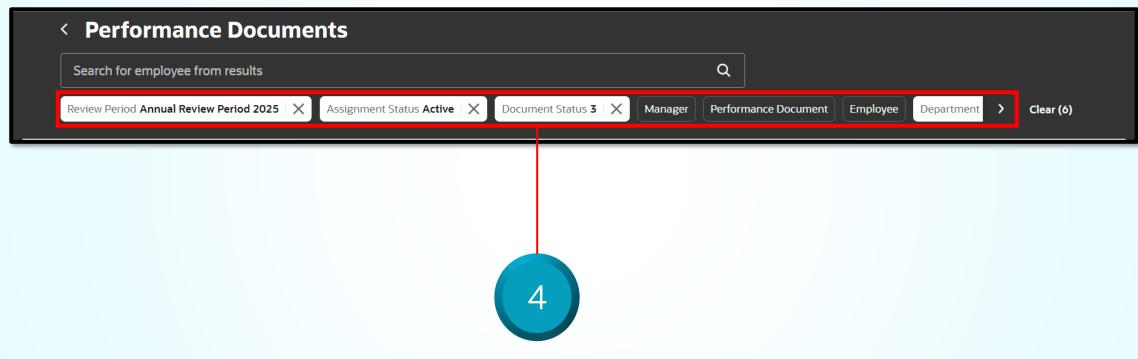






Select the **Performance Documents** Quick Action





Apply the filters for Review Period,
Assignment Status, Document Status and Department



On the Performance Documents page, view the performance evaluations for the employees in that cost center. To view a specific evaluation, select the performance document under the employee name.

**Performance Documents** Select the **Employee** Q Search for employee from results Name to view the Review Period Annual Review Period 2025 Assignment Status Active X Document Status 3 X Performance Document Clear (6) performance evaluations for that Select a performance document to change due dates, move the current task forward or back, or send an overdue task reminder. If sending an overdue task reminder ensure all documents have the same current task employee Transfer to New Manager Sort By Last Name, A to Z Complete Annual Review Period 2025 2025 - 2026 Annual Performance Review Document 99530 - Management Analyst II Person Number 113421 Shironda Harris Moore Current Task Current Task Status Manager Evaluation Ready





View all performance evaluations for the employee on the Employee Performance page



#### **Records Maintenance, Storage & Administration**



#### Personnel Records

- Required documentation as of January 2022 is housed in CV360.
- All performance documentation (Check-in Documentation, Anytime Document, and other authorized formats) are stored in CV360 only and not maintained at the department level in a separate record.

#### Open Records Requests (ORR)

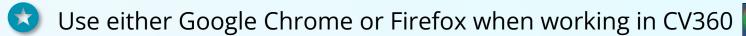
- Any required personnel related documents created after January 2022 are retrieved from CV360 for ORR and any other legal inquiries from CV360.
- All other records will be retrieved from department and HR manual records.
- All departments should use the same procedure to respond within the required timeframe.

## **Helpful Hints**





### Helpful Hints



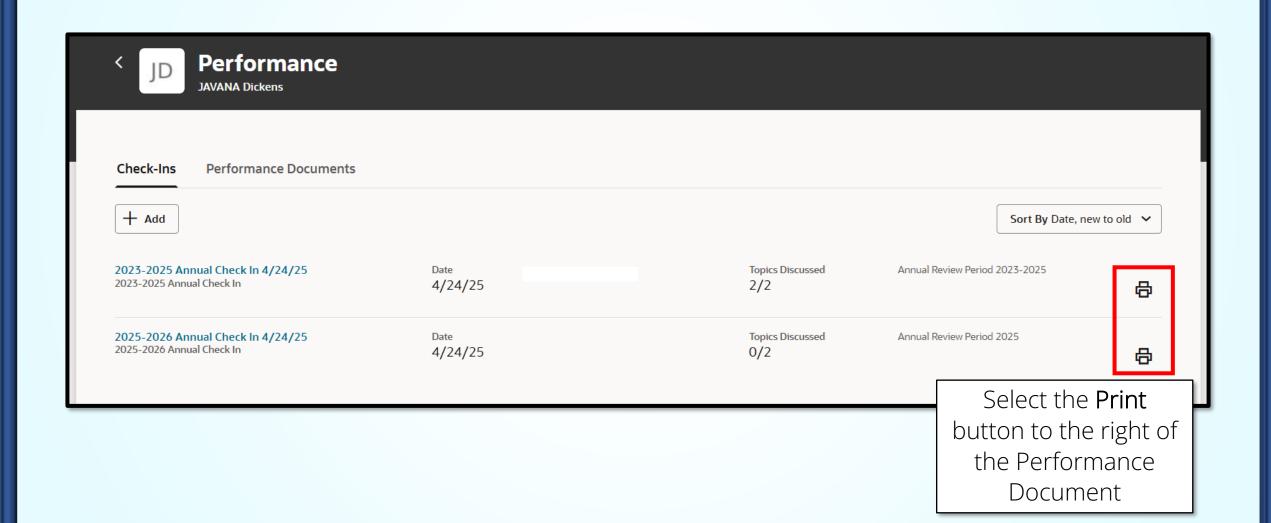


- When logging in remotely, make sure to connect via GlobalProtect
- Connecting to CV360 from an iPad restricts functionality connect from a PC or laptop
- Complete feedback in a Word document and copy/paste into the appropriate fields in the Anytime document
- The number of characters are unlimited, but the use of concise statements are recommended to capture value added feedback.
- Print or save a copy of performance documents from the ellipsis (...)

Managers should have a preliminary conversation with their department head to discuss any individual performance concerns and to obtain any feedback they may want to include prior to documenting in CV360

#### **How to Print/Save a Performance Document**





#### **60-Day Performance Review Strategy: Timeline and Expectations**

Goal: Launch and complete employee performance reviews within 60 days for the evaluation period April 1, 2024 – March 31, 2025.

| Date  | Completion Goal  |
|-------|--|
| 10/24 | Managers should have <b>25%</b> of direct reports performance evaluations completed with department director or designee approval  |
| 11/7  | Managers should have <b>50%</b> of direct reports performance evaluations completed with department director or designee approval  |
| 11/14 | Managers should have <b>75%</b> of direct reports performance evaluations completed with department director or designee approval  |
| 12/5  | Managers should have <b>100%</b> of direct reports performance evaluations completed with department director or designee approval |

#### **Open Sessions Schedule**

Technical assistance and coaching will be provided at the following performance open sessions. All sessions are 4:00-5:00 pm:

| Day       | Date     |
|-----------|----------|
| Wednesday | 10.15.25 |
| Thursday  | 10.16.25 |
| Friday    | 10.17.25 |
| Tuesday   | 10.21.25 |
| Wednesday | 10.22.25 |
| Thursday  | 10.23.25 |
| Tuesday   | 10.28.25 |
| Wednesday | 10.29.25 |
| Friday    | 10.31.25 |

| Day       | Date     |
|-----------|----------|
| Tuesday   | 11.4.25  |
| Wednesday | 11.5.25  |
| Friday    | 11.7.25  |
| Wednesday | 11.12.25 |
| Thursday  | 11.13.25 |
| Friday    | 11.14.25 |



## Talent Management Resources

## For additional information on the topics covered in this training use the following resources

- CV360 Training Hub
- QRG (If applicable)

Contact us at <a href="https://https://html.ncb.nlm.nc