

Talent/
Performance Management



Training Goal

Learn how to effectively use *Document Records* and the *Check-in Document*

April 1, 2022 – March 31, 2023
Performance Review Process



CloudVergent 360

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Learning Objectives

At the end of this session, participants will:

Understand the CV360 performance terminology

Understand individual roles in the talent/performance process

Learn how to use Document Records to upload performance documents external CV360

Develop skills to create a Check-In Document

Understand how an employee completes a self-evaluation utilizing the Check-In Document

Learn how approved designated staff edits, approves and saves a Check-In Document

Understand the Talent Coordinator role in performance process

Learn how to create, update and closeout a Development Plan



CV360 Talent/Performance Terminology



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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)
Talent Approver*	Serves as the final approver in the evaluation process in CV360 (Department Head, unless otherwise delegated to another designee (in a leadership position) Note: *Manager is the talent approver for the PY22-23 Check-in Document

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

Terminology



CV360 Terminology	Definition
Review Period (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 2022)
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
Individual Performance Goals	Goals assigned or aligned to individual employees or job classes
Check-in Document	Performance summary consisting of an optional employee questionnaire (self-evaluation), manager questionnaire (provision of feedback to employee), general discussion topics and managers approval status
Questionnaire	Two types to comprise the check-in document, one employee (self-evaluation) and one manager (feedback to employee) to guide performance improvement and to set employee up for success
General Discussion	Key areas of discussion for improvement or targeted goal achievement



ORGANIZATIONAL GOALS

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






















Uploading Manual Performance Documents



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Access Rights to Manual Performance Documents

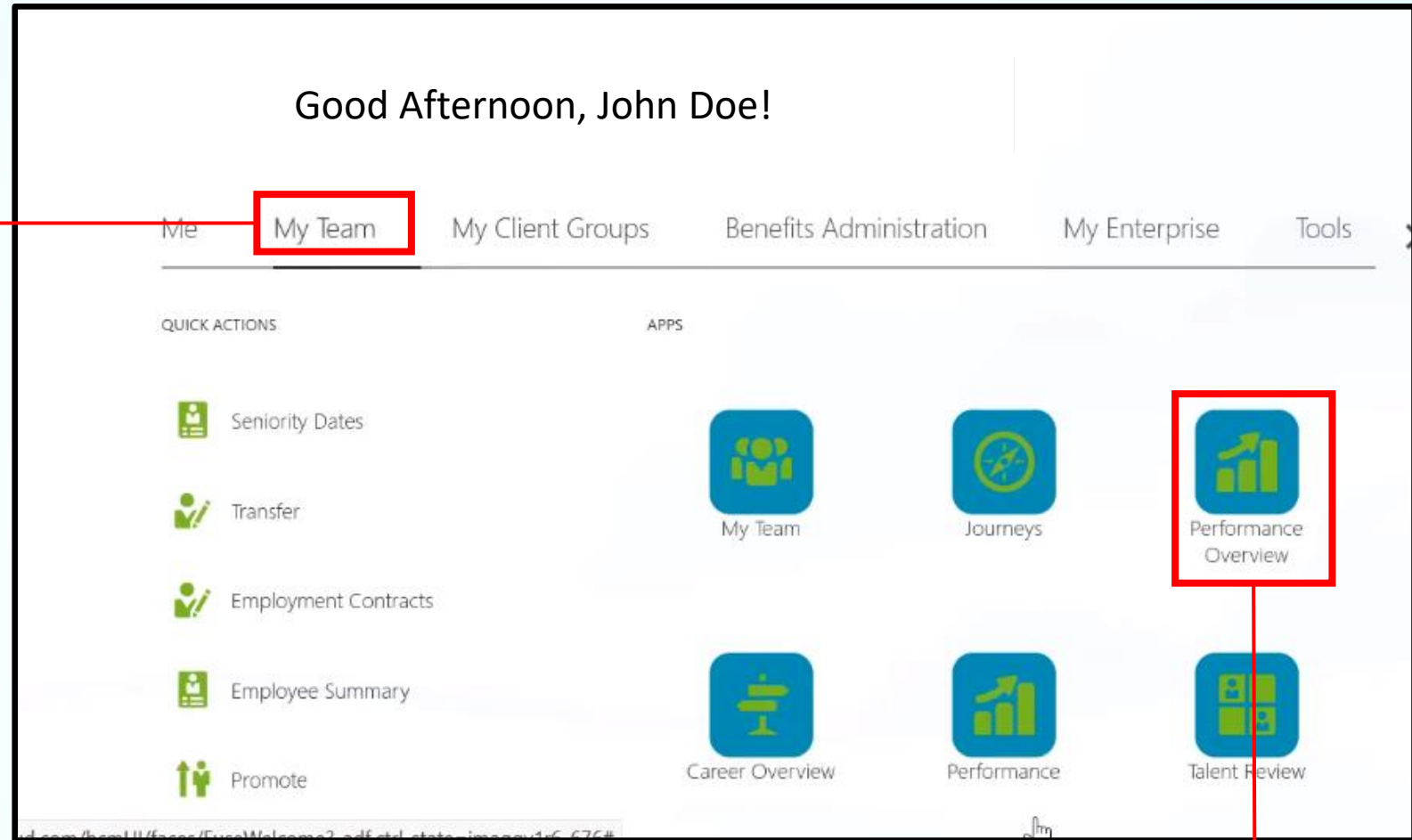


	View	Create	Edit	Upload	Delete
Talent Administrator					
Department Head					
Talent Manager					
Line Manager					
Talent Coordinator					
Employee					

Managers: Uploading Manual Performance Documents

1

Select the **My Team** tab from the top of the CV360 Home page



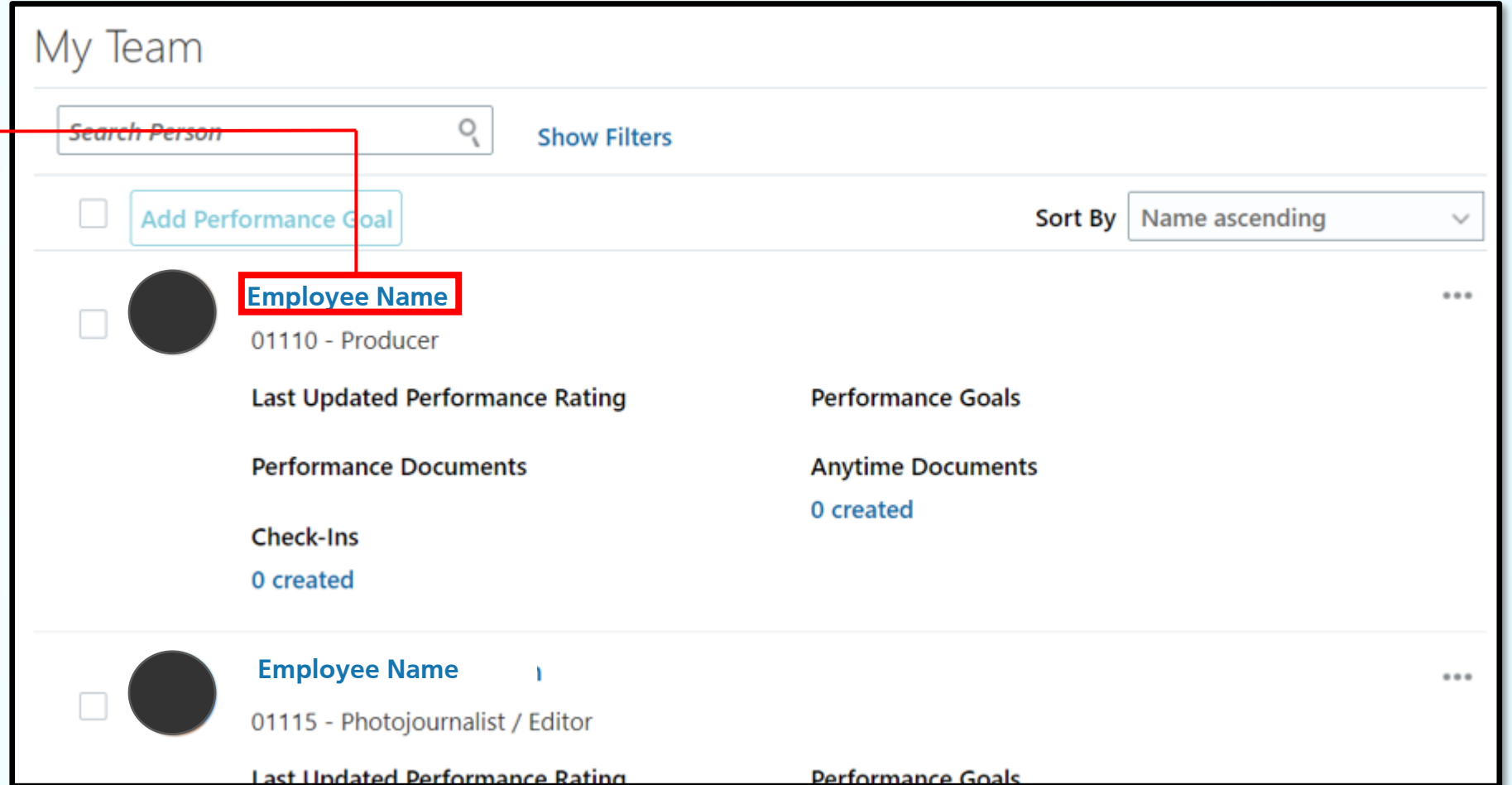
Select the **Performance Overview** tile from the Apps section

2

Managers: Uploading Manual Performance Documents



3

Click the hyperlink of the employee's name you want to upload a performance document for



My Team

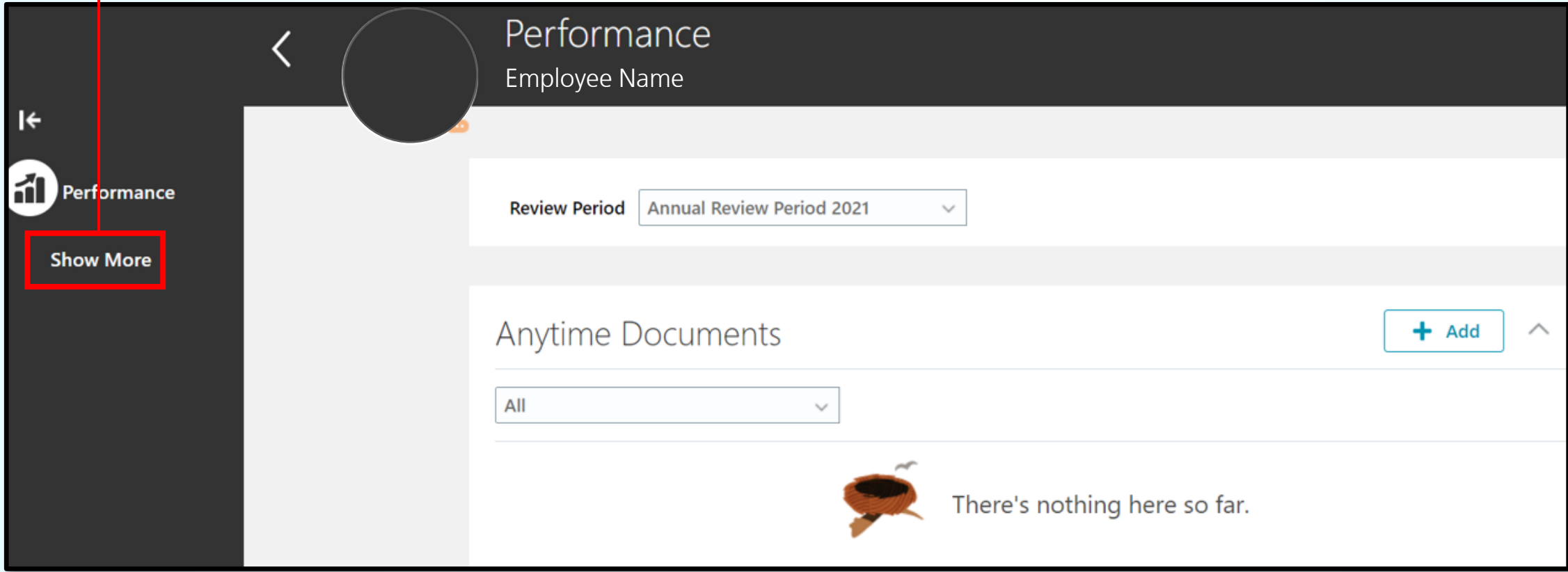
Sort By

<input type="checkbox"/>		Employee Name	...
		01110 - Producer	
		Last Updated Performance Rating	Performance Goals
		Performance Documents	Anytime Documents
		Check-Ins	0 created
		0 created	
<input type="checkbox"/>		Employee Name	...
		01115 - Photojournalist / Editor	
		Last Updated Performance Rating	Performance Goals

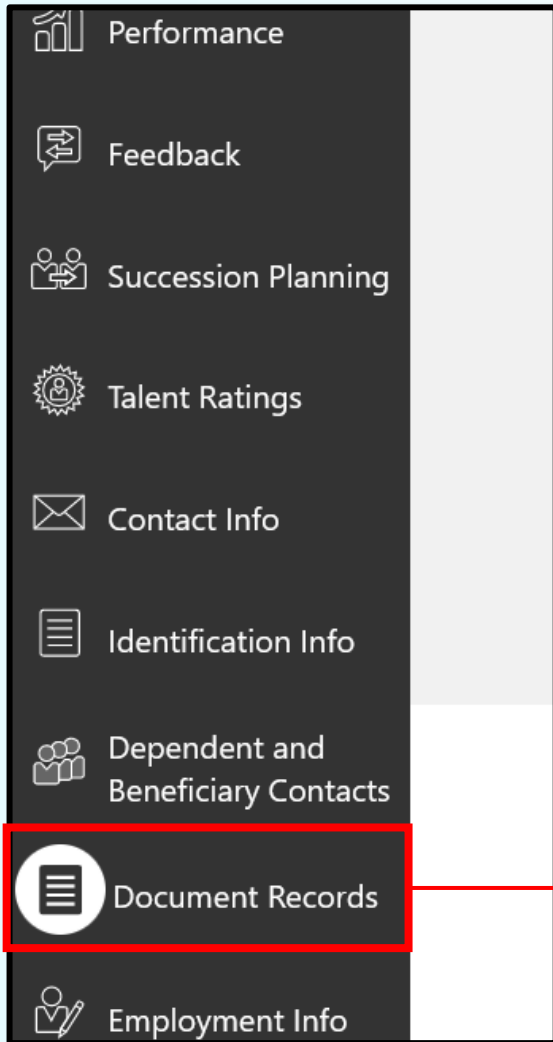
Managers: Uploading Manual Performance Documents

4

Click the **Show More** tab from the side bar to expand the employee's information

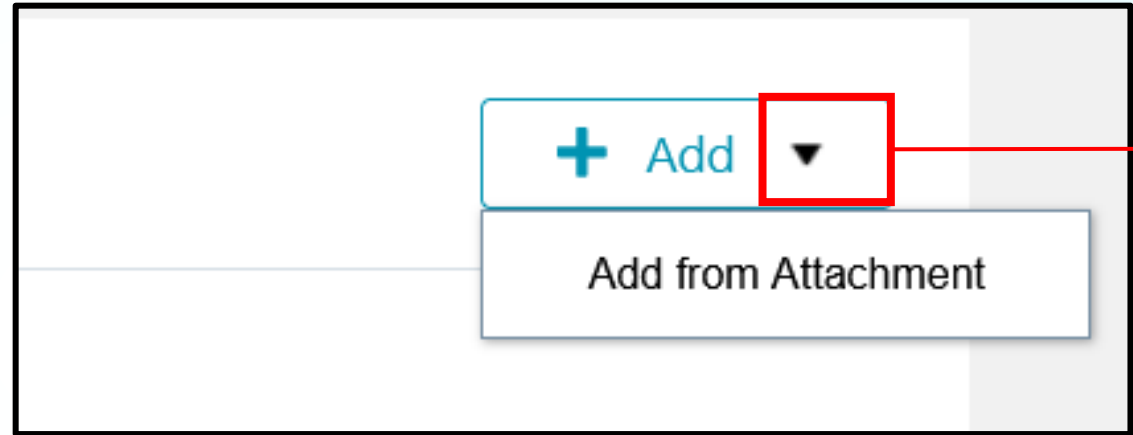


Managers: Uploading Manual Performance Documents



5

Click the Document Records tab from the side bar



From the +Add dropdown, select Add from Attachment

6

Managers: Uploading Manual Performance Documents

7

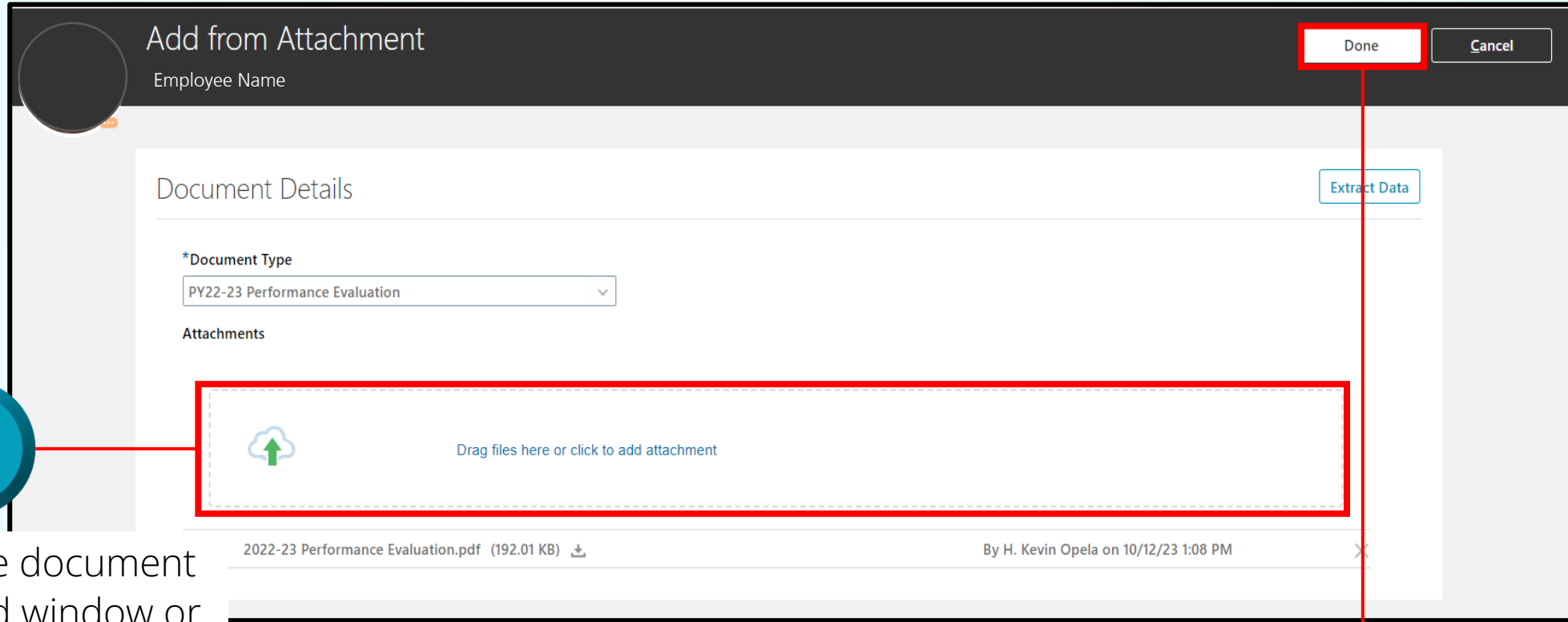
Enter "Performance" in the Document Type Search bar and select PY22-23 Performance Evaluation from the available options

Document Details

*Document Type

Name	Country	Category	Subcategory
Performance Based		Awards and recognitions	
PY22-23 Performance Evaluation		Performance	
Achievements - nonperformance based		Awards and recognitions	

Managers: Uploading Manual Performance Documents



8

9

Select Done

Either drag the document into the upload window or select the link to find the document from your computer file browser



The paper evaluation document must be saved as PDF prior to upload!

Managers: Uploading Manual Performance Documents

Enter a name for the document in the Name field

10

Document Details

***Document Type**
PY22-23 Performance Evaluation

Category
Performance

Country
United States

Description
The new document type is to add a historical performance document (manual upload) for those who completed it on paper and want to scan in/upload the document to CV360 Document Records (vs. adding the performance feedback into CV360 via the feedback form in the Performance Management module). The users will have the option to add to document records if they already completed via paper or if they haven't completed it they can input the performance feedback into the performance module using the electronic form setup.

Name
Performance Feedback Summary Form

Issuing Country
Select a value

Issuing Location

Issuing Authority

Number

From Date
m/d/yy

Document name options: *Performance Feedback Summary Form* (abbreviated option HR provided in 2022), *Standard Performance Document* (10-page document), and/or *Development/Improvement Plan*

Managers: Uploading Manual Performance Documents

11

In the **From Date** field enter "4/1/22"

In the **To Date** field enter "3/31/23"

In the **Issued On** field enter the date the employee signed the performance evaluation

Document Details

***Document Type**
PY22-23 Performance Evaluation

Name
Performance Feedback Summary Form

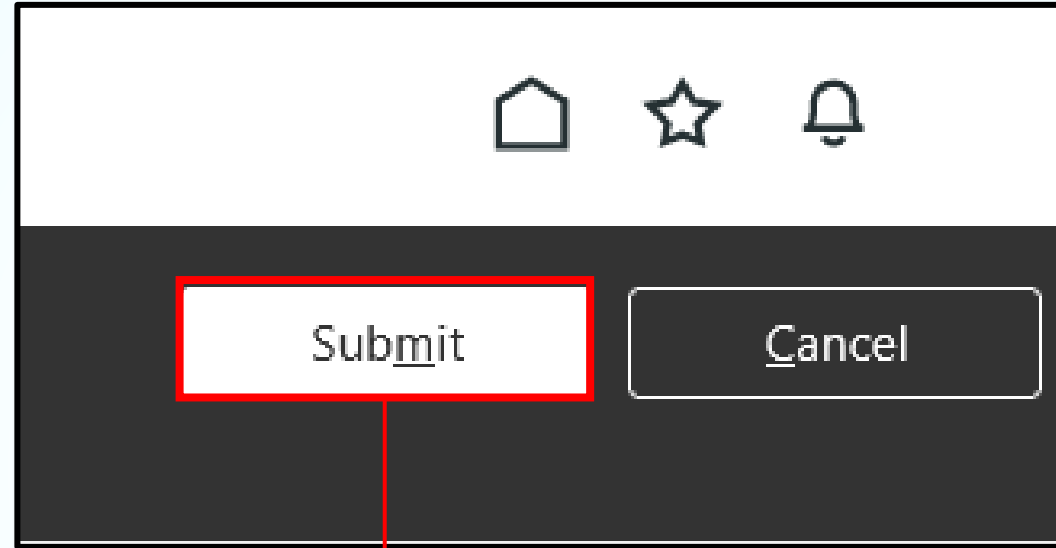
Number

From Date
4/1/22

To Date
3/31/23

Issued On
1/16/23

Managers: Uploading Manual Performance Documents



12

Select the **Submit** button to upload the performance document

Note: This process is valid only for the 2022-23 Performance Year!



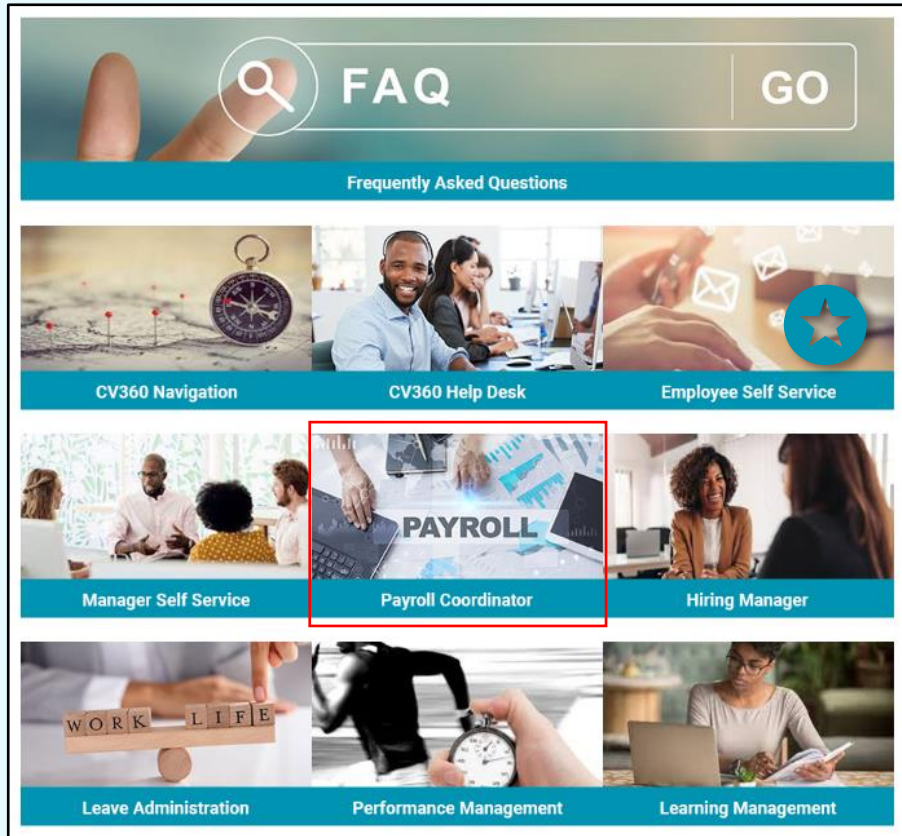
Reviewing Document Records



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Reviewing Document Records

Find the process guide on the CV360 Training Hub



View/Update Employee Person Details	
Quick Reference Guide	Description
View an Employee's Demographic and Biographic Information	View employee person information
View an Employee's Document Records Details	View employee documents e.g., Emergency Contact information
View an Employee's Extra Information	View employee Company Asset and Medicare Indicators
View an Employee's Person Identifiers for External Application Details	View employee system access
View an Employee's Seniority Dates Details	View employee Enterprise and Legal Employer Service Date
View an Employee's Talent Profile Skills and Qualifications Details	View employee internal resume
View an Employee's Work Relationship Details	View employee work relationship details

[View an Employee's Document Records Details](#)

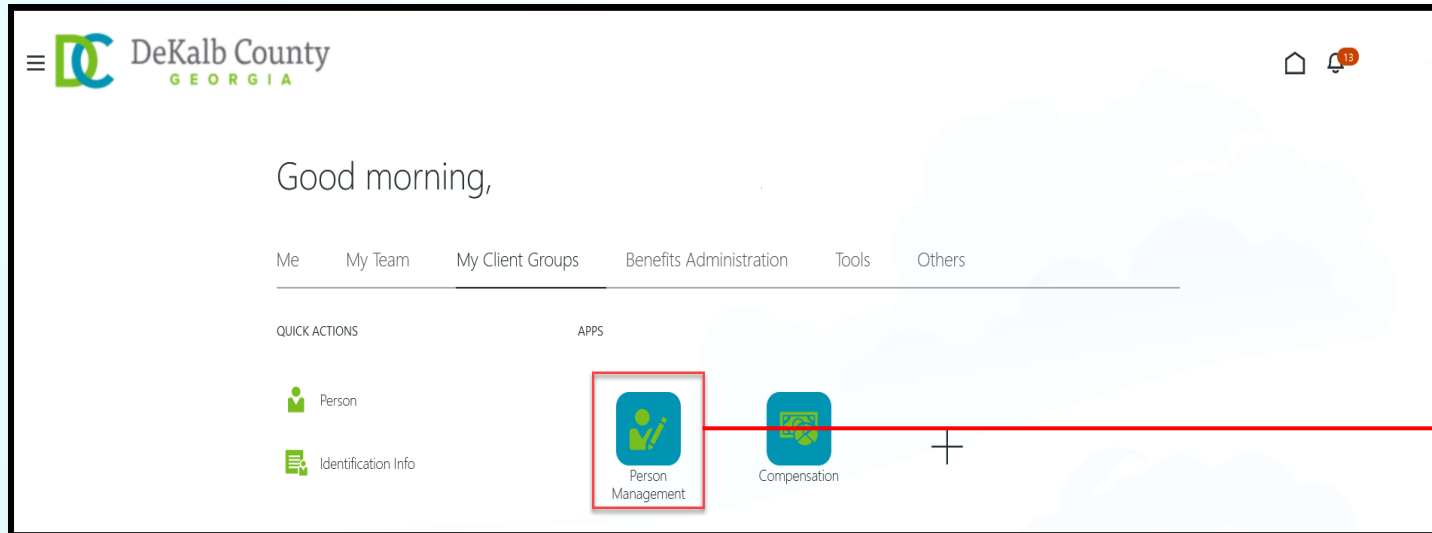
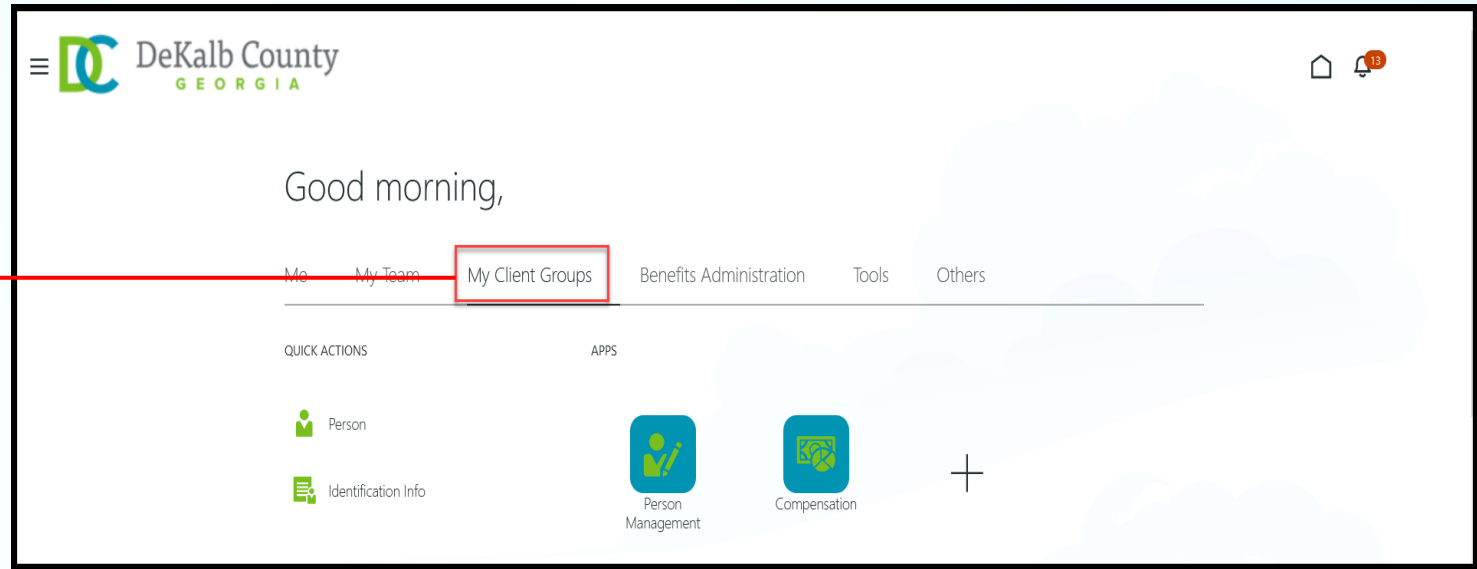


Remember to remove filters when searching for documents!

Reviewing Document Records

1

Select the **My Client Groups** tab from the CV360 homepage



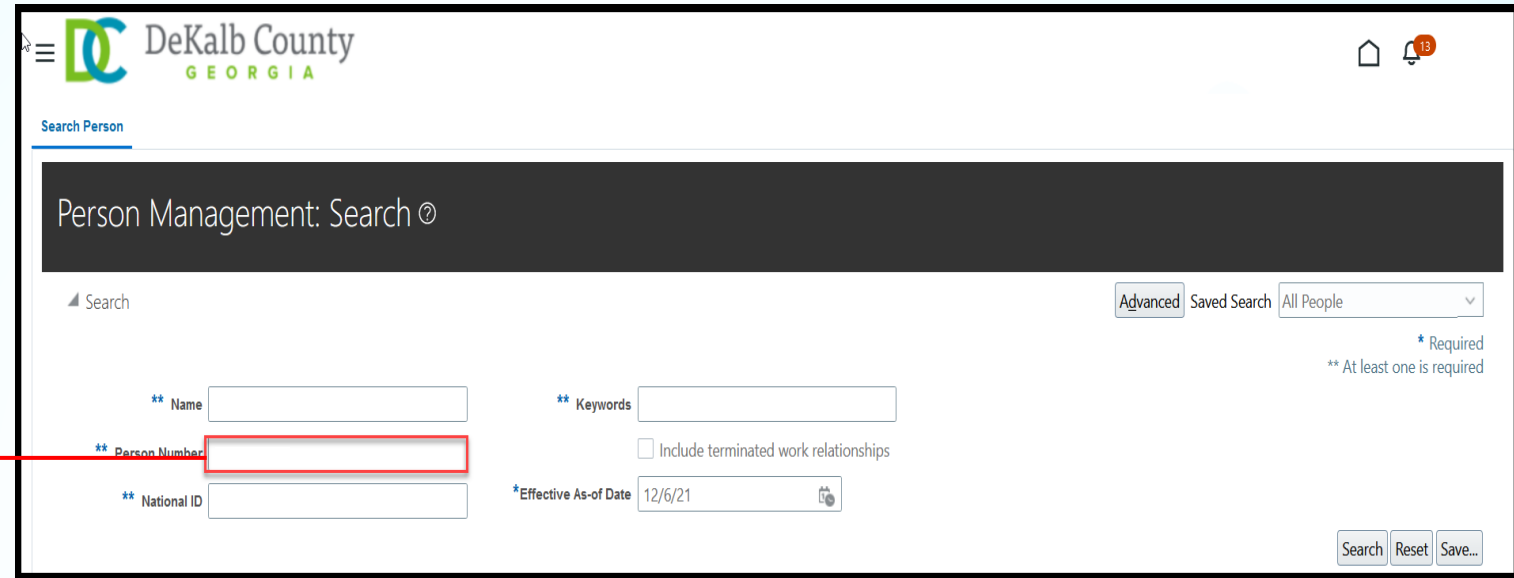
2

Select the **Person Management** tile within the Apps area

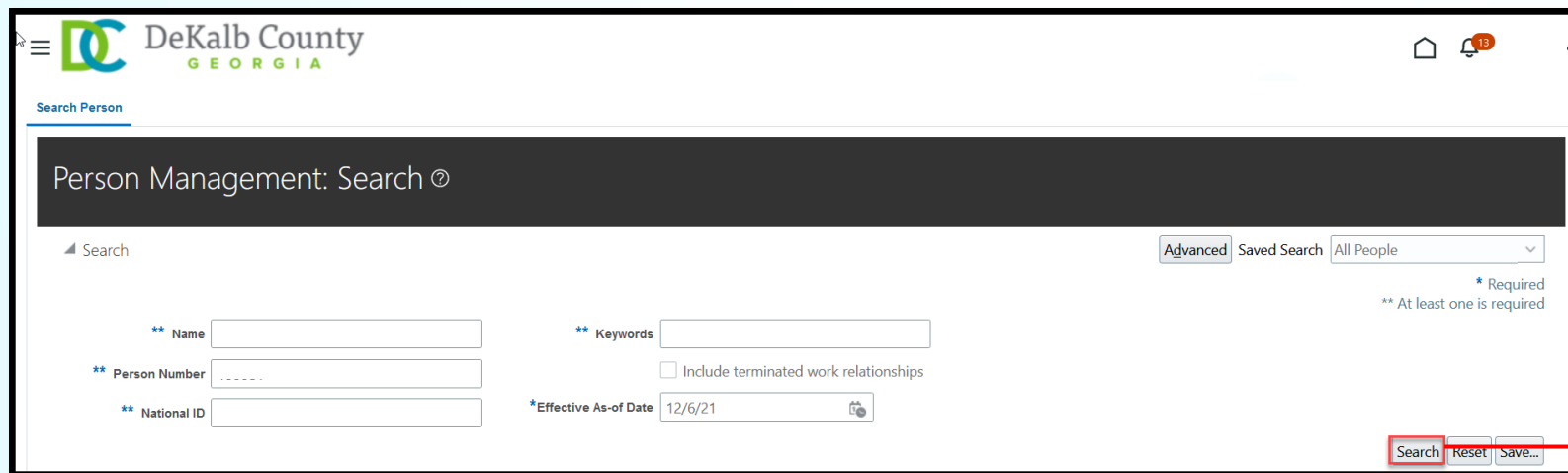
Reviewing Document Records

From the Person Management: Search page, key in the Name or Employee Number of the Employee

3



The screenshot shows the DeKalb County Person Management Search page. The page header includes the DeKalb County logo and the text "DeKalb County GEORGIA". Below the header is a "Search Person" link. The main content area is titled "Person Management: Search" and contains a search form. The form includes fields for "Name", "Person Number", and "National ID", all marked as required (**). There is also a "Keywords" field and an "Effective As-of Date" field set to 12/6/21. A checkbox for "Include terminated work relationships" is present. The form has "Search", "Reset", and "Save..." buttons. A red box highlights the "Person Number" field, and a red line connects it to the number 3 in the adjacent text.



This screenshot is identical to the one above, but with a red box highlighting the "Search" button at the bottom right of the form. A red line connects this button to the number 4 in the adjacent text.

! Employees may be searched by Name, Person Number, or by Keywords

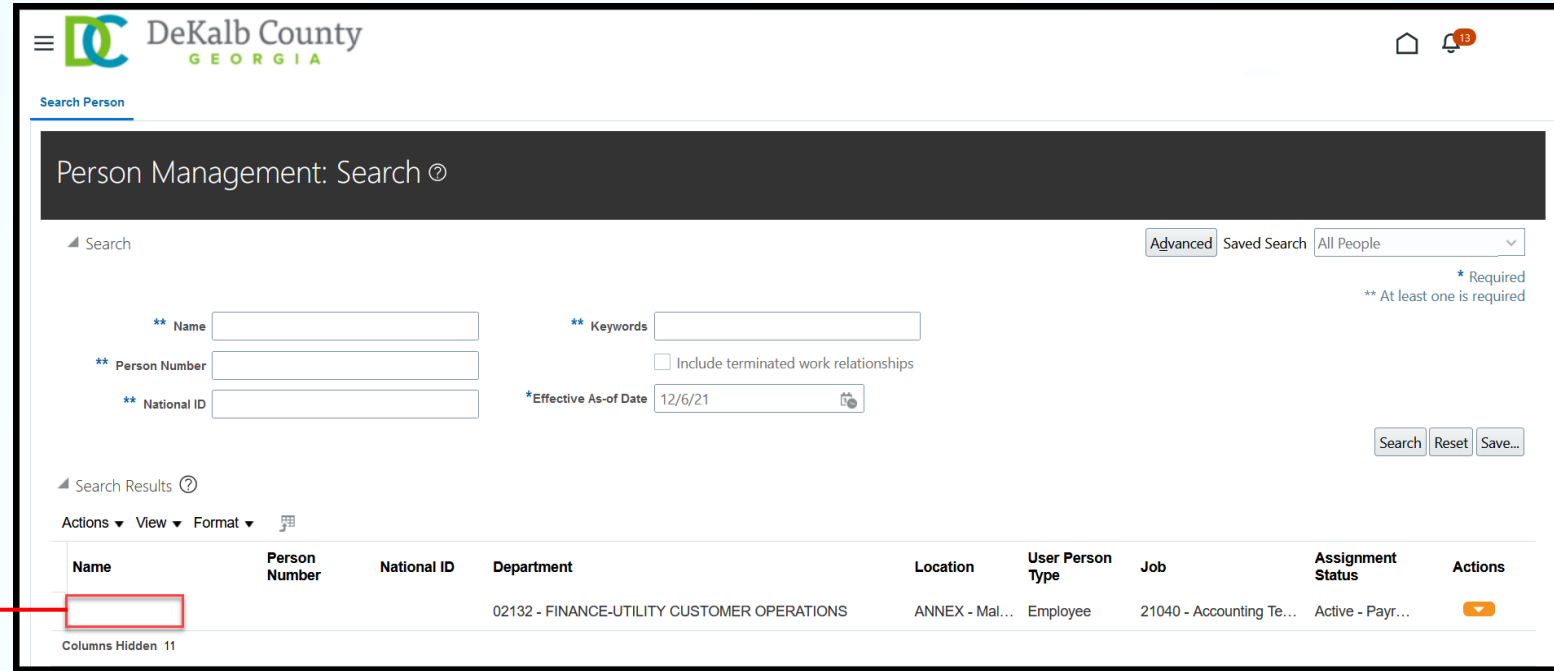
4

Select the Search button

Reviewing Document Records

From the Search Results section, select the Employee's Name link

5



DeKalb County GEORGIA

Person Management: Search

Search Person

Advanced Saved Search All People

** Name ** Keywords

** Person Number Include terminated work relationships

** National ID *Effective As-of Date 12/6/21

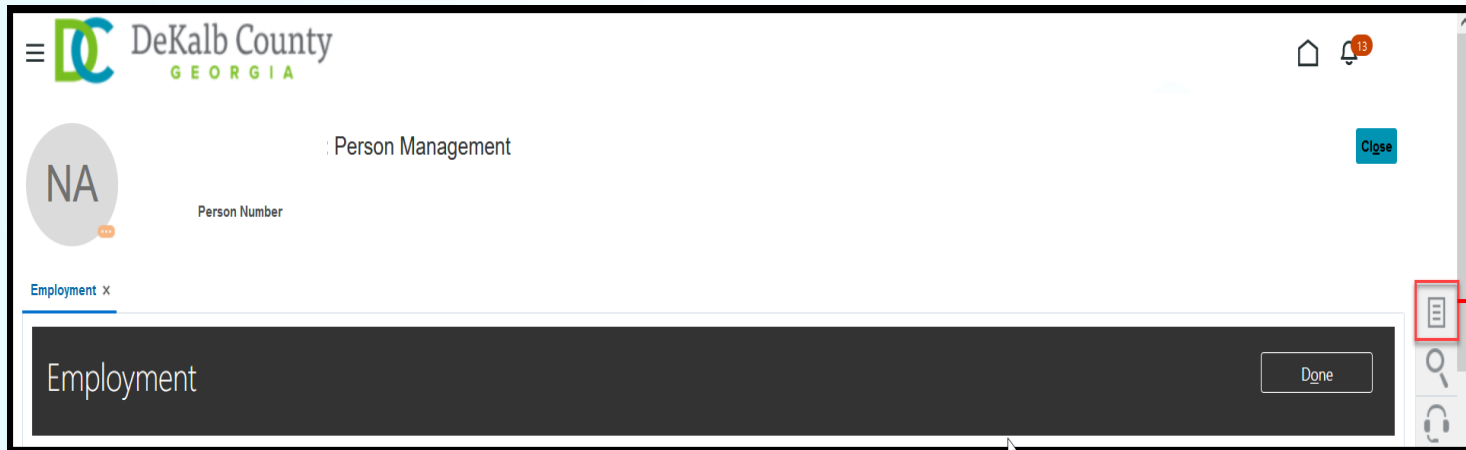
Search Reset Save...

Search Results

Actions View Format

Name	Person Number	National ID	Department	Location	User Person Type	Job	Assignment Status	Actions
[Red Box]			02132 - FINANCE-UTILITY CUSTOMER OPERATIONS	ANNEX - Mal...	Employee	21040 - Accounting Te...	Active - Payr...	

Columns Hidden 11



DeKalb County GEORGIA

Person Management

Close

NA Person Number

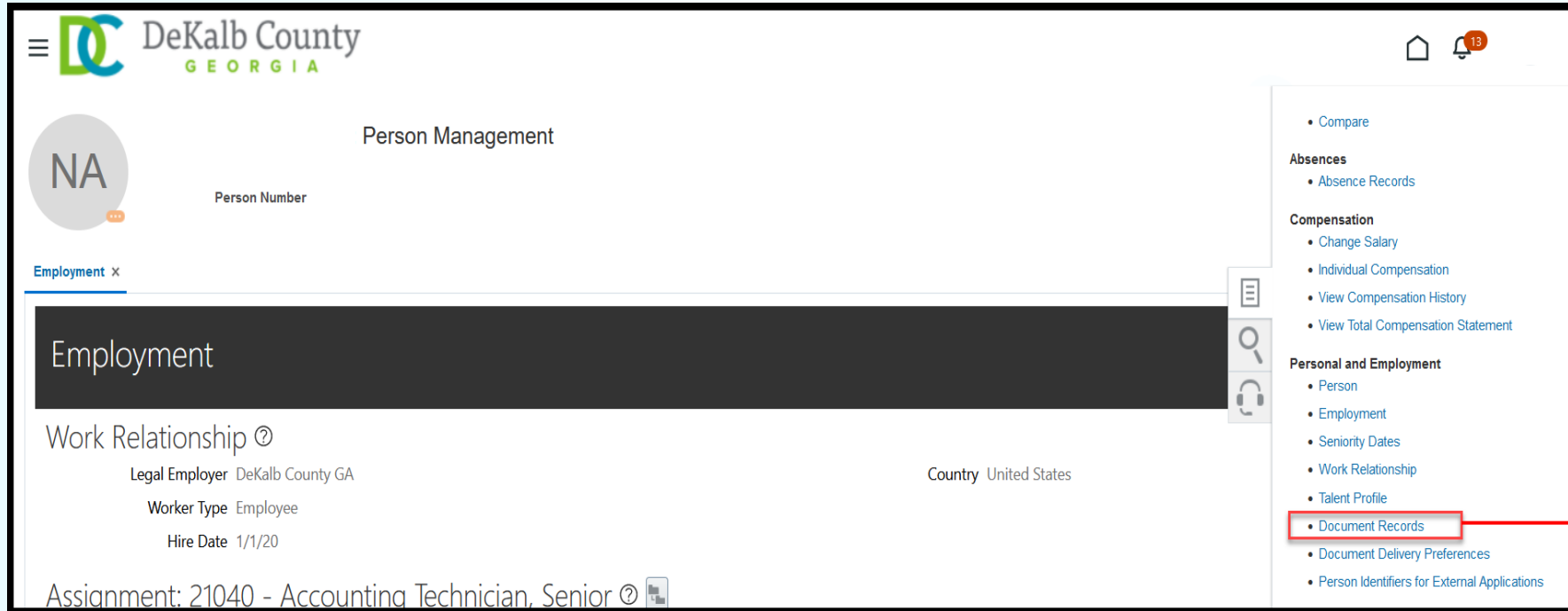
Employment x

Employment Done

6

From the Employment page, select the Panel Drawer icon

Reviewing Document Records



The screenshot shows the DeKalb County Georgia HR system interface. At the top left is the DeKalb County Georgia logo. The main header area includes a user profile icon with 'NA' and the text 'Person Management'. Below this is a tab for 'Employment'. The main content area displays 'Work Relationship' information: 'Legal Employer DeKalb County GA', 'Country United States', 'Worker Type Employee', and 'Hire Date 1/1/20'. At the bottom, it shows 'Assignment: 21040 - Accounting Technician, Senior'. On the right side, a panel drawer is open, listing various options. The 'Document Records' option is highlighted with a red box. A red line connects this box to a blue circle containing the number '7'.

DeKalb County
GEORGIA

Person Management

NA
Person Number

Employment x

Employment

Work Relationship ⓘ
Legal Employer DeKalb County GA
Country United States
Worker Type Employee
Hire Date 1/1/20

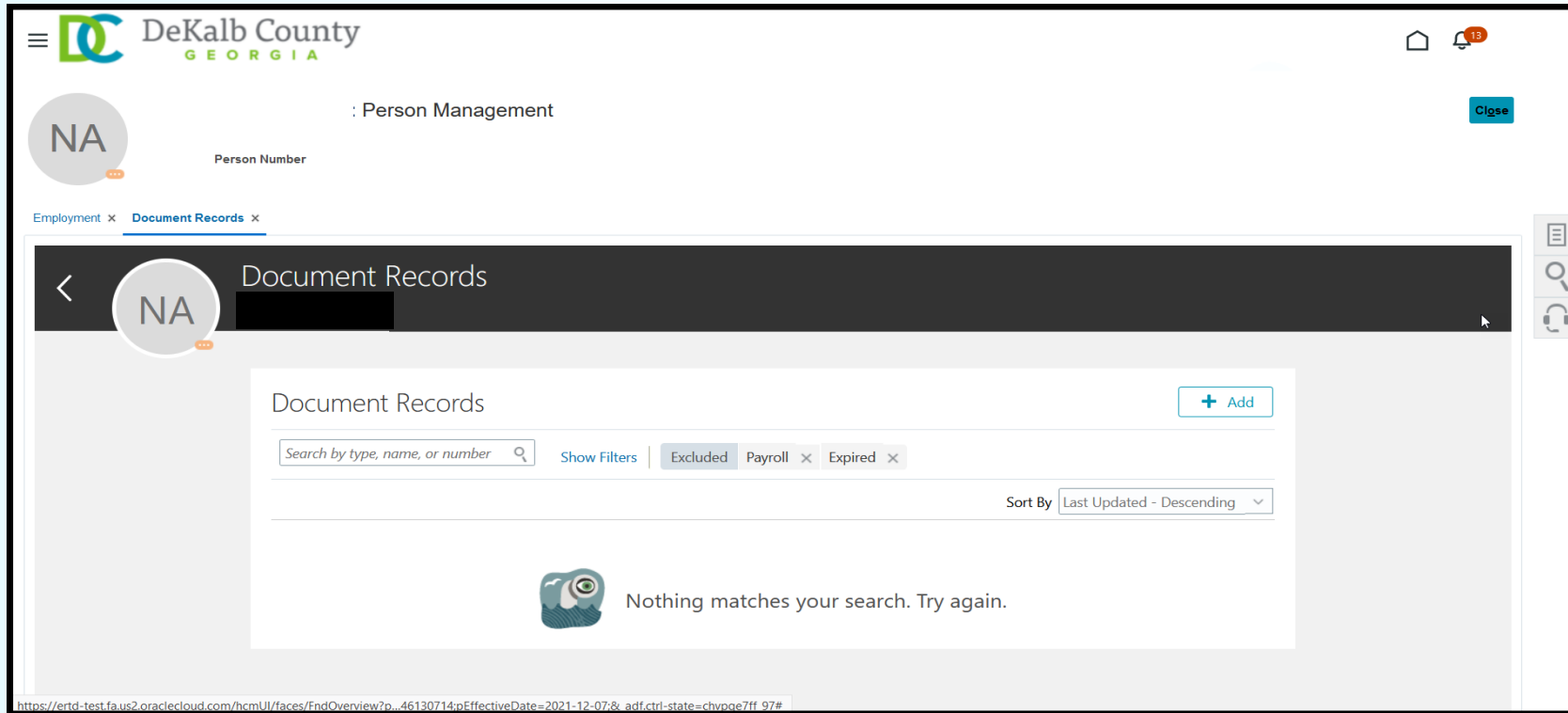
Assignment: 21040 - Accounting Technician, Senior ⓘ

- Compare
- Absences
 - Absence Records
- Compensation
 - Change Salary
 - Individual Compensation
 - View Compensation History
 - View Total Compensation Statement
- Personal and Employment
 - Person
 - Employment
 - Seniority Dates
 - Work Relationship
 - Talent Profile
 - Document Records
 - Document Delivery Preferences
 - Person Identifiers for External Applications

From the Panel Drawer
select the **Document
Records** link from the
Personal and Employment
section



Reviewing Document Records



The screenshot shows the DeKalb County Georgia HR system interface. At the top, the DeKalb County logo and name are visible. The user is logged in as 'NA' (Person Number). The main navigation bar includes 'Employment' and 'Document Records' tabs. The 'Document Records' tab is active, showing a search bar with the text 'Search by type, name, or number', a 'Show Filters' button, and filter tags for 'Excluded', 'Payroll', and 'Expired'. The 'Sort By' dropdown is set to 'Last Updated - Descending'. A message icon with the number '13' is visible in the top right corner. A 'Close' button is located in the top right of the main content area. The main content area displays a message: 'Nothing matches your search. Try again.' with a small icon of a person's head.

8

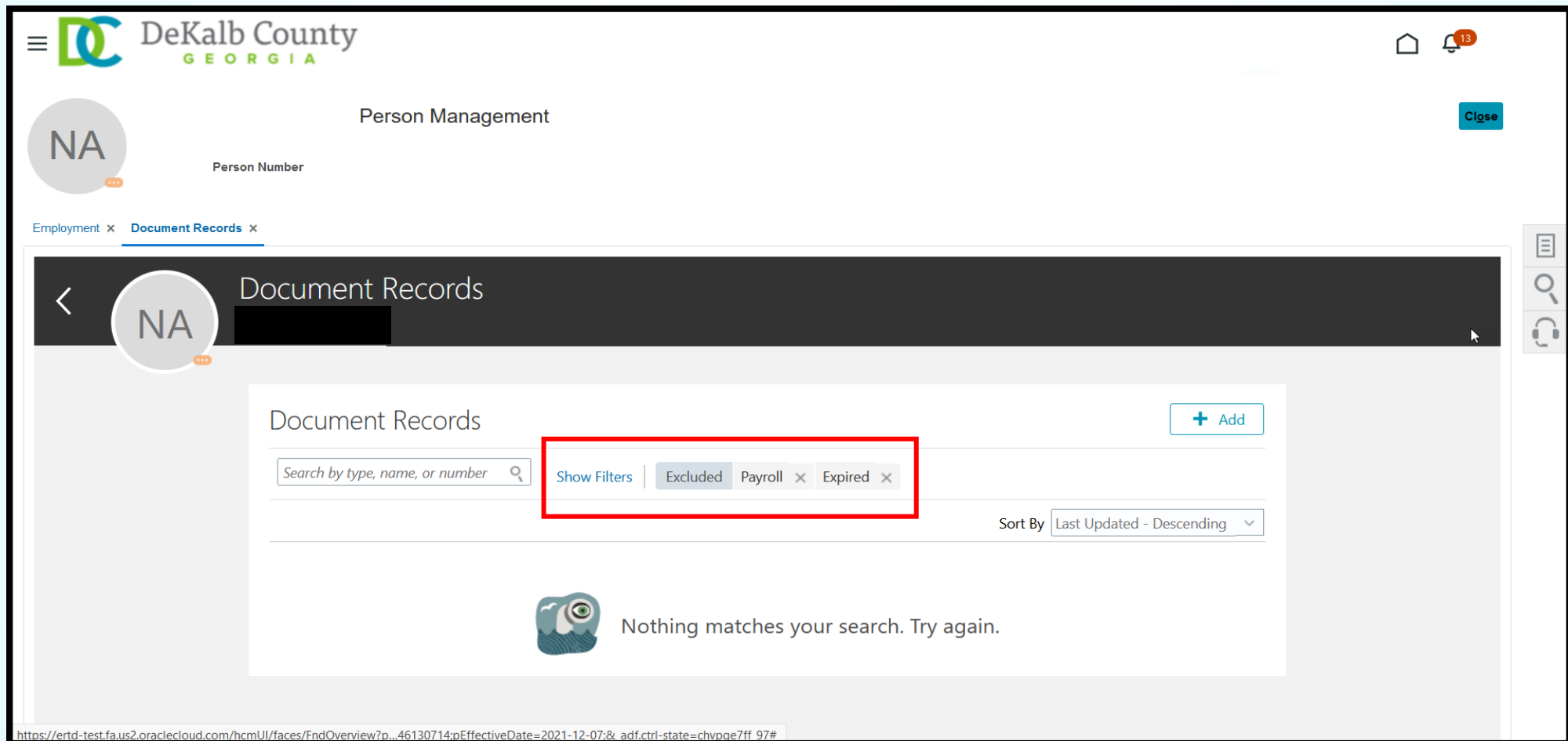
From the Document Records tab, review the documents assigned to the Employee.

If no Documents have been assigned, a message, "Nothing matches your search. Try again." will appear on the page

Reviewing Document Records



*If the documents you are looking for do not appear, deselect the filters by selecting the **x** next to the filter name*



The screenshot shows the DeKalb County Person Management interface. At the top, there is a navigation bar with the DeKalb County logo and the text "DeKalb County GEORGIA". Below this, the page title "Person Management" is displayed. A user profile icon with the initials "NA" is visible. The main content area is titled "Document Records" and includes a search bar with the placeholder text "Search by type, name, or number". To the right of the search bar, there is a "Show Filters" button and a list of active filters: "Excluded", "Payroll", and "Expired". Each filter has a small "x" icon next to it, which is highlighted by a red box. Below the filters, there is a "Sort By" dropdown menu set to "Last Updated - Descending". At the bottom of the page, there is a message that says "Nothing matches your search. Try again." with a small icon of a person's head.



Creating a Check-In Document



Create a Check-In Document

- Check-In Documents allow the employee and line/talent manager to have a **1-on-1 documented digital conversation** about performance
 - No ratings available for check-ins for PY22-23
 - Questionnaires (*CV360 feedback process*) utilized for the employee and manager to complete to help 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
- CV360 records the date of the check-in



The Check-In Document is used to complete the **PY2022-23** performance review if the manual process has not been completed.

How to Get Started



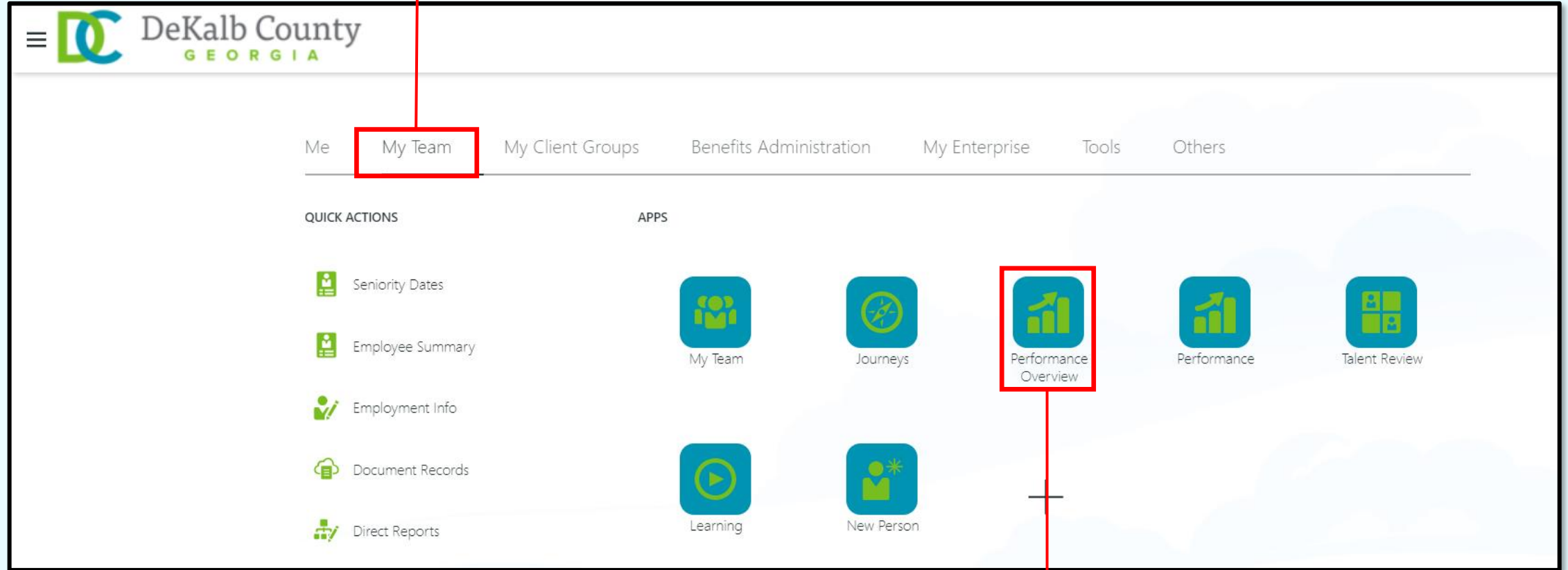
- **Manager creates the *Check-In document for each individual employee.***
- **If department head requires employees to complete a self-evaluation, it is recommended that due dates be established to assist in closing out the process.**
NOTE: If self-evaluations are required by department, HR recommends consistency for determining applicable job classifications.
- **Employee completes the *Employee Questionnaire* to provide a self-evaluation as feedback to manager.**
- **Manager completes *Manager Questionnaire* to provide constructive feedback to employee.**

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.

Create a Check-In Document

1

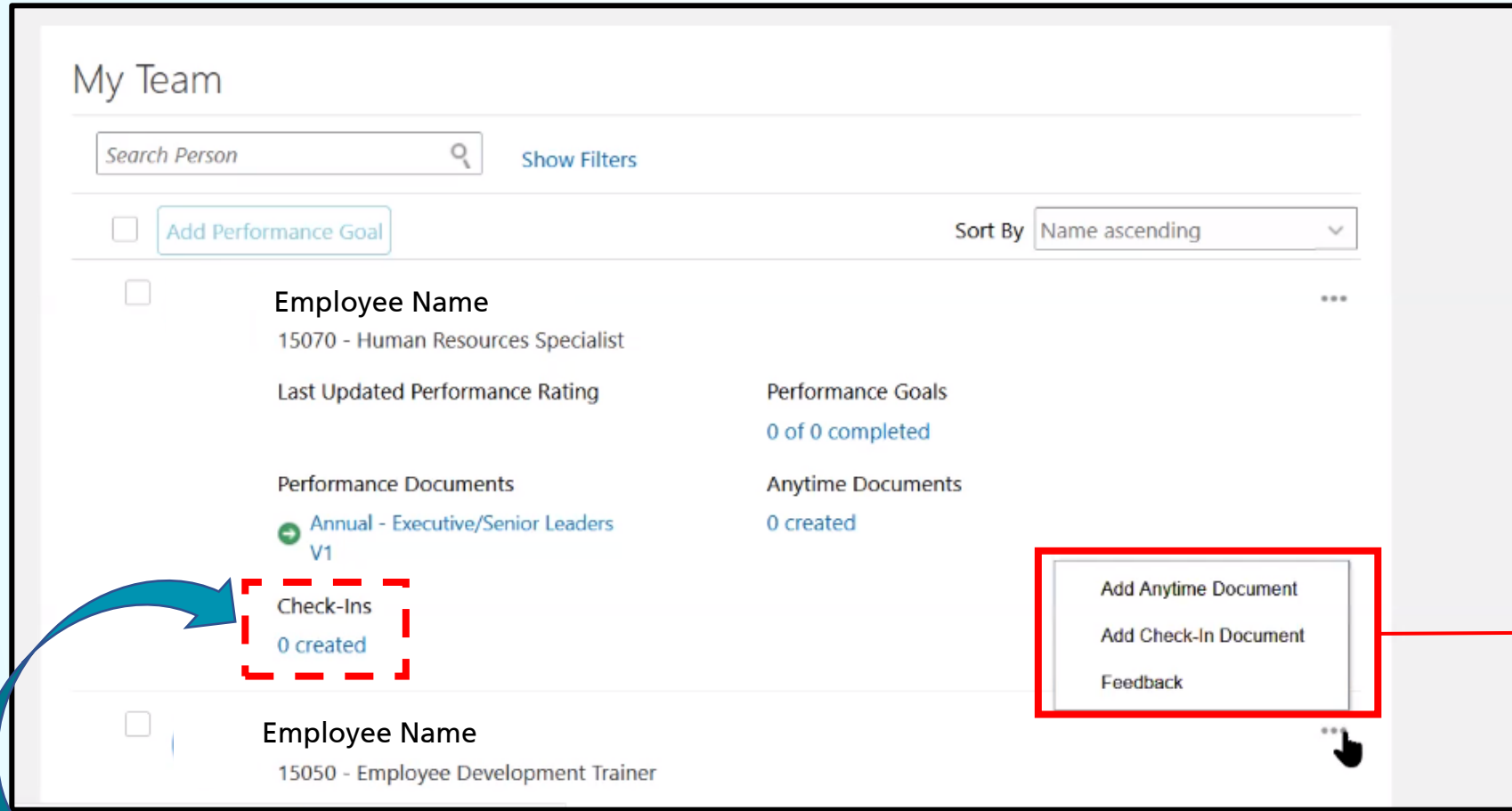
On the home page, navigate to My Team



2

Click on the Performance Overview tile

Create a Check-In Document



My Team

Search Person Show Filters

Add Performance Goal Sort By Name ascending

Employee Name 15070 - Human Resources Specialist

Last Updated Performance Rating Performance Goals
0 of 0 completed

Performance Documents Anytime Documents
Annual - Executive/Senior Leaders V1 0 created

Check-Ins
0 created

Employee Name 15050 - Employee Development Trainer

- Add Anytime Document
- Add Check-In Document
- Feedback

Select the ellipsis and **Add Check In Document** option from the drop-down list next to the appropriate employee name

3

To open an existing Check-In Document, select it from the Check-Ins section.

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.

Create a Check-In Document

Review the information details for the Check-In Document

Modify the Name and Date fields
To indicate 3/31/23, as shown below



Details

Review Period
Annual Review Period 2022

Template
2022-2023 Annual Check In

***Name**

Manager
...

***Date**

Select the **Save** button.



Note: Change the **Date** to 3/31/23 to reflect the applicable performance cycle

⚡ Click the **Save** button after reviewing the information

Create a Check-In Document

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



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

Check-In Scheduled

Hello Employee

Your Manager [redacted] scheduled a check-in for you. Review the agenda and add discussion topics as required.

Thank you.

You and Your Manager

Check-in Date: 2023/03/31

[Go to Check-in](#)

Agenda

+ Add discussion topic

Check-In Document Created

Hello, Employee

Your Manager [redacted] created your Check-In document 2022-2023 Annual Check In 3/31/23A. Review and add any comments.

Thank you.

Review Period	Annual Review Period 2022
Check-In Date	2023-03-31
Check-In Template	2022-2023 Annual Check In

[Go to Check-In document: 2022-2023 Annual Check In 3/31/23A](#)

CV360 Notifications

Notifications are only triggered upon *creation* of the Check-In document.

Current process does NOT trigger any CV360 notifications to the employee or the manager regarding *changes* to the Check-In document.

It is very important to have open communication about the process regarding expectations and timelines.





Employee Self-Evaluation Process: Utilizing the Check-In Document



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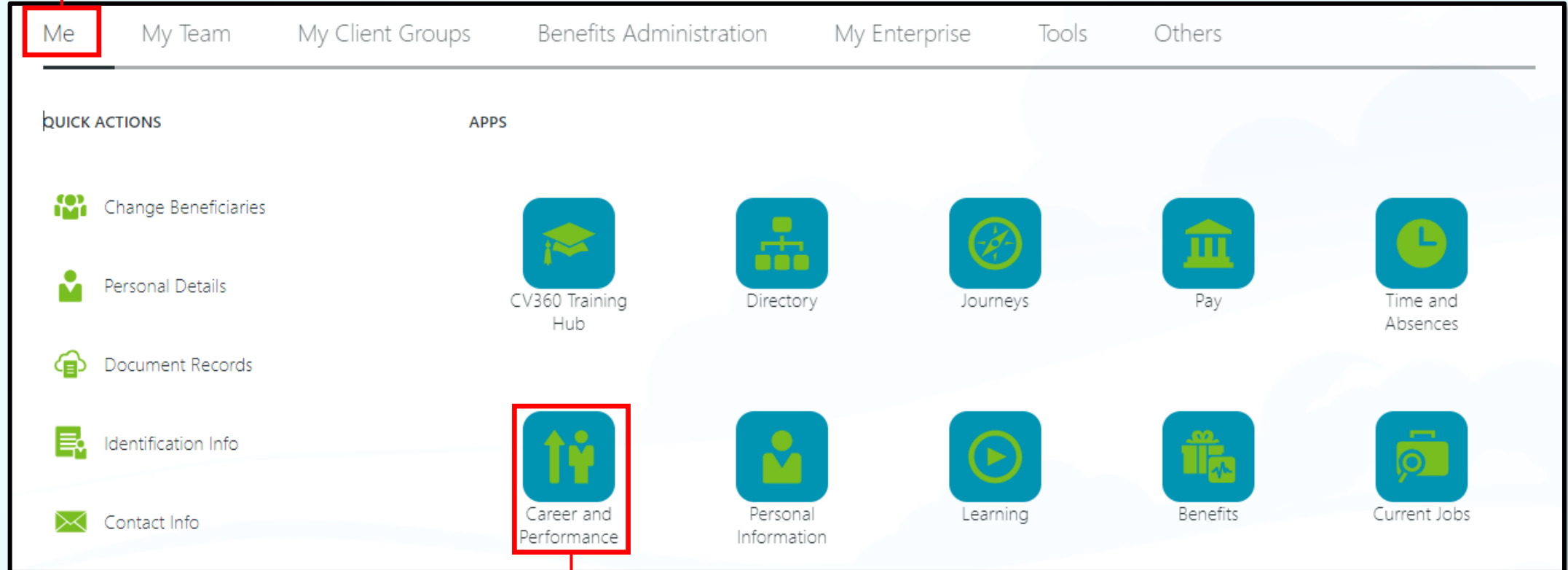
Employee Self-Evaluation



- Employee self-evaluations are to be completed at the discretion of the department head.
- Department heads may require all or targeted job classifications to complete the employee questionnaire (self-evaluation) component of the Check-in Document.

Employee Self-Evaluation Process

1 On the home page, navigate to the Me Tab

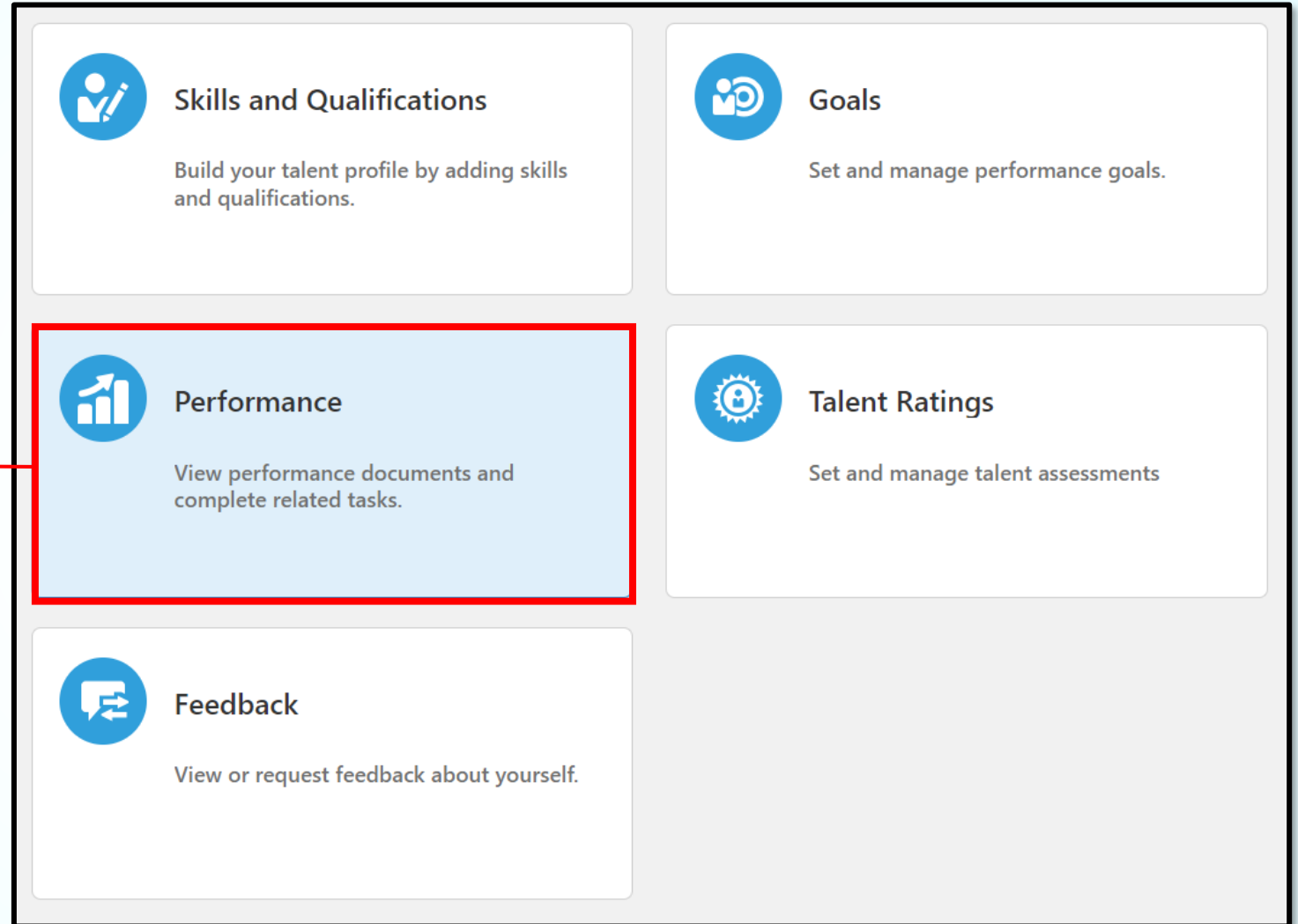
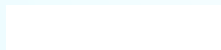


2 Select the Career and Performance tile

Employee Self-Evaluation Process

3

Select the
Performance card



Employee Self-Evaluation Process



Review Period

Check-Ins [+ Add](#)

Sort By

2022-2023 Annual Check In 3/15/23 2022-2023 Annual Check In	Discussed With Manager Name 3/15/23	...
---	--	-----



In the Check-Ins section, select the Check-In Document to be completed

Employee Self-Evaluation Process

Questionnaire For

Employee Feedback

Strengths – Identify performance indicators where you consistently exceed expectations/demonstrate accountability

Opportunities – Identify areas to help you be more successful in your performance and role

Accomplishments – Describe major performance contributions, accomplishments, and achievements during the performance cycle

Developmental Goals – Identify specific training or activity to complete to enhance performance

Career Goals – Identify goals to guide your professional growth in a desired area or to reach the next level in your career

Other Comments

Edit

5

Select Edit

Employee Self-Evaluation Process

Key in the appropriate information in the available fields



Strengths – Identify performance indicators where you consistently exceed expectations/demonstrate accountability

1. Proficiently check the director's calendar to support preparedness for meetings and tasks due dates with minimum errors. 2. Developed a standard operating procedure to manage internal celebrations to build team morale.

Opportunities for Improvement – Identify training and/or other professional development needs to help you be more successful in your role

1. Set routine meetings with the Director's direct reports to remain current on current work projects and understand time and resource challenges. 2. Take more initiative to familiarize myself with user department stakeholder in varied project types.

Accomplishments – Describe major performance contributions, accomplishments, and achievements during the performance cycle

1. Attained Associate PHR certification in February 2022. 2. Successfully completed Excel Intermediate training to enhance my database management tasks.

Developmental Goals - Identify specific training or activity to be completed within a specific time frame

1. Meet with HR OED manager to seek project management training or skill development opportunities for discussion with the HR Director (my manager)

Other Comments

Employee Self-Evaluation Process

Questionnaire For

Employee Feedback

Strengths – Identify performance indicators where you consistently exceed expectations/demonstrate accountability

1. Proficiently check the director's calendar to support preparedness for meetings and tasks due dates with minimum errors. 2. Developed a standard operating procedure to manage internal celebrations to build team morale.

Opportunities for Improvement – Identify training and/or other professional development needs to help you be more successful in your role

1. Set routine meetings with the Director's direct reports to remain current on current work projects and understand time and resource challenges. 2. Take more initiative to familiarize myself with user department stakeholder in varied project types.

Accomplishments – Describe major performance contributions, accomplishments, and achievements during the performance cycle

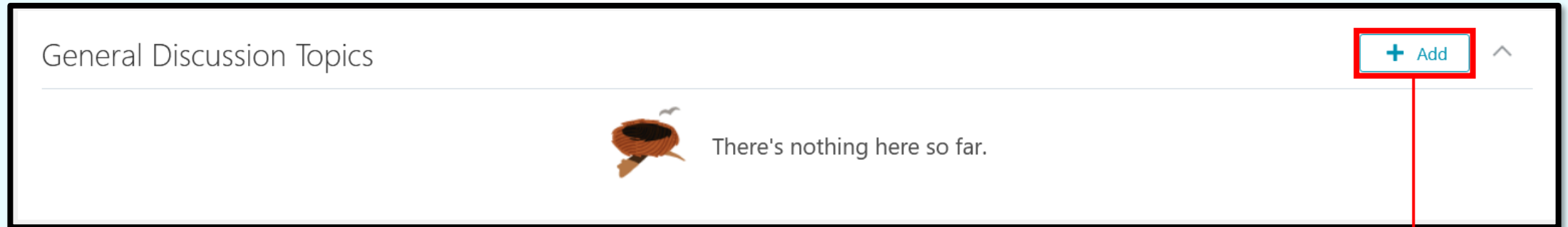
1. Attained Associate PHR certification in February 2022. 2. Successfully completed Excel Intermediate training to enhance my database management tasks.

Save Cancel



Select the **Save** button to update the Check-In

Employee Self-Evaluation Process



Scroll to the bottom of the document and select the + Add button in the General Discussion Topics section

6

Use the General Discussion Topics section to discuss specific areas of concern or to set targeted goals.

Employee Self-Evaluation Process

General Discussion Topics

***General Discussion Topic**
New topic ▾

***Topic Name**
Attendance

Note
Discussed the importance of being on time and not leaving early.

Words: 11 Characters (with HTML): 71

Save Cancel



Select the
Save button



Managers can *view, add* and *edit* General Discussion Topics.

Employees can only *view*.



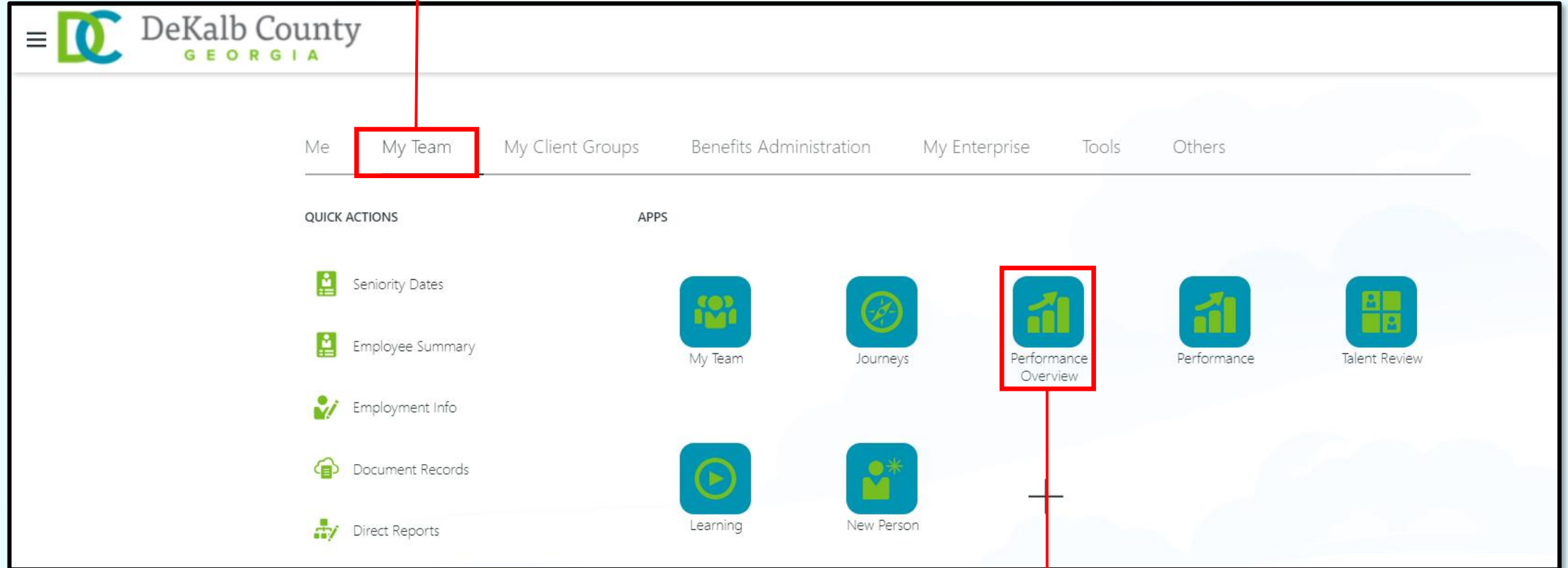
How a Manager completes a Check-In Document



Complete a Check-In Document

1

On the home page, navigate to My Team




2

Click on the Performance Overview tile

Complete a Check-In Document

My Team

[Add Performance Goal](#) Sort By

 **Employee Name** ⋮
Court Administrator

Last Updated Performance Rating

Performance Goals
0 of 0 completed

Performance Documents

Anytime Documents
0 created

Check-Ins
[1 created](#) | Last on 8/31/23

3

Open the list of available Check-In documents by selecting the **# created** link

Complete a Check-In Document

Review Period

Check-Ins + Add ^

Sort By

	Discussed With	Manager Name	
2022-2023 Annual Check In 9/1/23 2022-2023 Annual Check In	9/1/23		...



Select the link for the desired Check-In Document

Complete a Check-In Document

Questionnaire

Manager Questionnaire

Strengths – Review performance indicators where employee consistently exceeds expectations/demonstrate accountability

Opportunities – Indicate areas where employee may perform more successfully in assigned role

Accomplishments – Describe employee’s major performance contributions, accomplishments, and achievements during the performance cycle

Developmental Goals – Identify specific training or activity for employee to complete to enhance performance

Career Goals – Provide guidance to assist employee in achieving professional and personal growth

Other Comments

Employee Questionnaire Response

 Edit

5

Select Edit

Complete a Check-In Document

Key in the appropriate comments in the Strengths, Opportunities, Accomplishments, Developmental Goals and Career Goals fields



Strengths – Review performance indicators where employee consistently exceeds expectations/demonstrate accountability

Ms. Employee demonstrates a positive attitude when engaging with the HR members, customer user departments, and external stakeholders. She exceeds in planning details that align with my routine meeting schedule and other external meeting - Executive Leadership, BOC, and BOC committee meeting and managing after action items.

Opportunities – Indicate areas where employee may perform more successfully in assigned role

Ms. Employee engages with the deputy director and other HR managers to increase awareness of division priority tasks and projects to help manage the status of the Critical Project List. Another area may include embracing SharePoint as a powerful tool for collaboration with HR teams on varied tasks to ensure real-time status updates and access.

Accomplishments – Describe employee's major performance contributions, accomplishments, and achievements during the performance cycle

Ms. Employee attained her Associate PHR certification in February 2023. This is a major accomplishment as this was dually pursued while working on her Master Degree in Organizational Leadership.

Developmental Goals – Identify specific training or activity for employee to complete to enhance performance

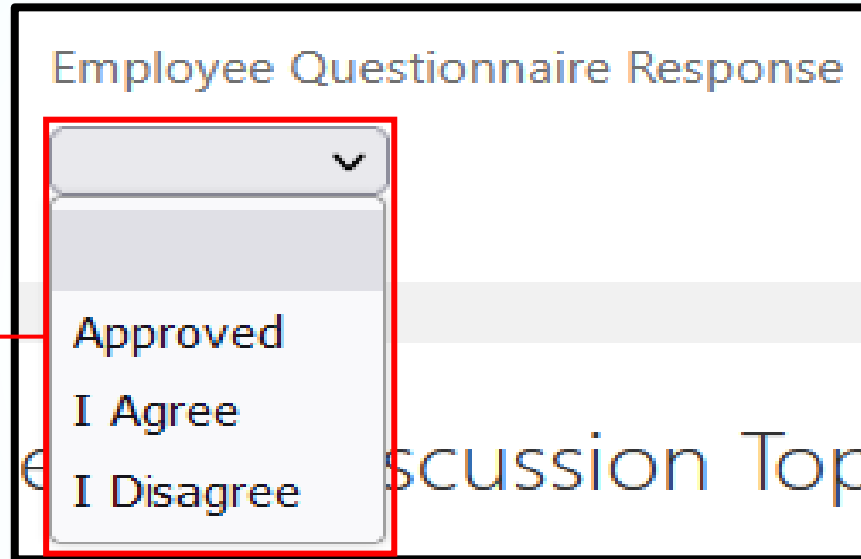
Enrollment in SharePoint, Adobe Acrobat and Visio training will be beneficial to skills enhancement and efficiency.

Career Goals – Provide guidance to assist employee in achieving professional and personal growth

Complete a Check-In Document

In the dropdown for Employee Questionnaire Response select either **Agree** or **Disagree**

7



Employee Questionnaire Response

- Approved
- I Agree
- I Disagree



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.

Complete a Check-In Document

! 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

Complete a Check-In Document

Manager Questionnaire

Save Cancel

Strengths – Review performance indicators where employee consistently exceeds expectations/demonstrate accountability

Ms. Employee demonstrates a positive attitude when engaging with the HR members, customer user departments, and external stakeholders. She exceeds in planning details that align with my routine meeting schedule and other external meeting - Executive Leadership, BOC, and BOC committee meeting and managing after action items.

Opportunities – Indicate areas where employee may perform more successfully in assigned role

Ms. Employee engages with the deputy director and other HR managers to increase awareness of division priority tasks and projects to help manage the status of the Critical Project List. Another area may include embracing SharePoint as a powerful tool for collaboration with HR teams on varied tasks to ensure real-time status updates and access.

Accomplishments – Describe employee's major performance contributions, accomplishments, and achievements during the performance cycle

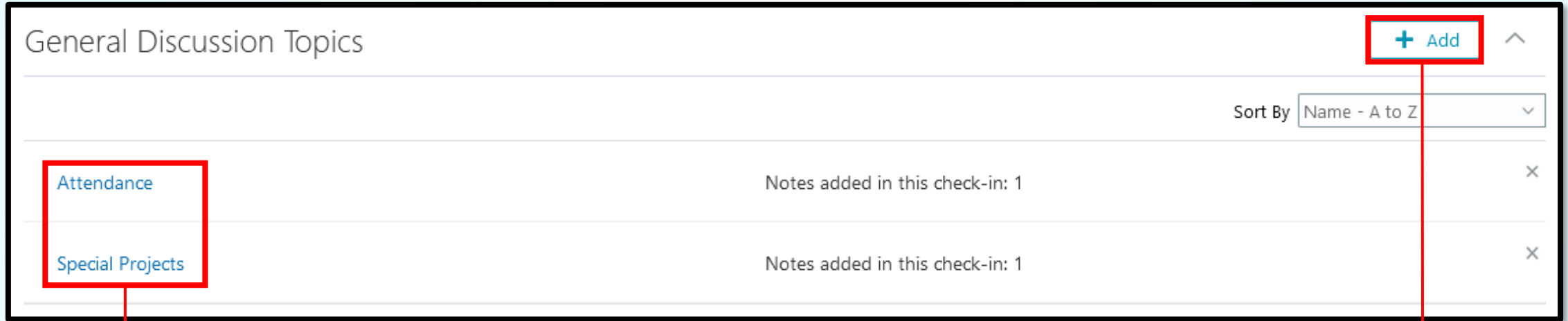
Ms. Employee attained her Associate PHR certification in February 2023. This is a major accomplishment as this was dually pursued while working on her Master Degree in Organizational Leadership.

Developmental Goals – Identify specific training or activity for employee to complete to enhance performance



Select the **Save** button to update the Check-In Document

Complete a Check-In Document



General Discussion Topics

+ Add

Sort By Name - A to Z

Attendance Notes added in this check-in: 1

Special Projects Notes added in this check-in: 1

10

To open/edit an existing topic, select the link of the topic name

Scroll to the bottom of the document and select the + Add button in the General Discussion Topics section

9



Use the General Discussion Topics section to discuss specific areas of concern or to set targeted goals.

Complete a Check-In Document

General Discussion Topics

***General Discussion Topic**
New topic ▾

***Topic Name**
Attendance

Note
Discussed the importance of being on time and not leaving early.

Words: 11 Characters (with HTML): 71

Save Cancel

11

Enter the appropriate information and select the **Save** button



Managers can *view, add* and *edit* General Discussion Topics.

Employees can only *view*.

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 Edit button!
- **NEVER use the Delete button!**



Talent Coordinators: How to Verify Submission of Performance Documents



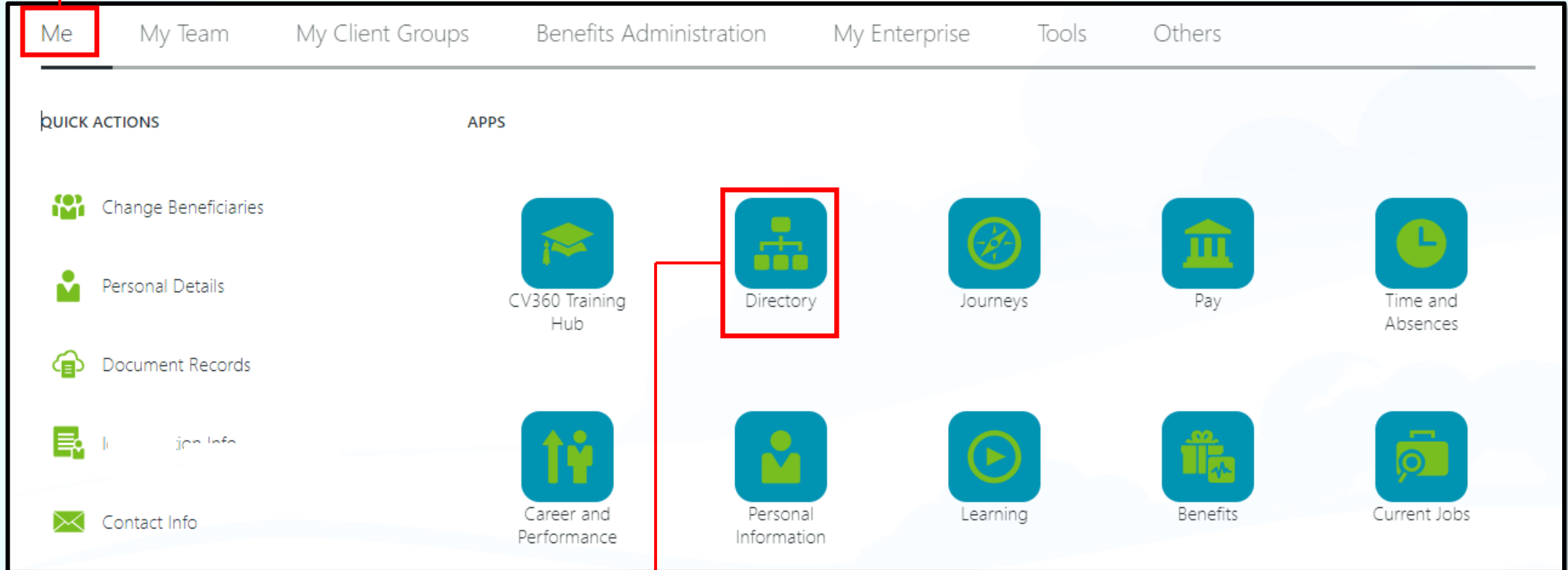
CloudVergent 360



**Payroll/Absence Coordinators *-serving as*
Talent Coordinators have access to
Document Records and the Check-in Documents.**

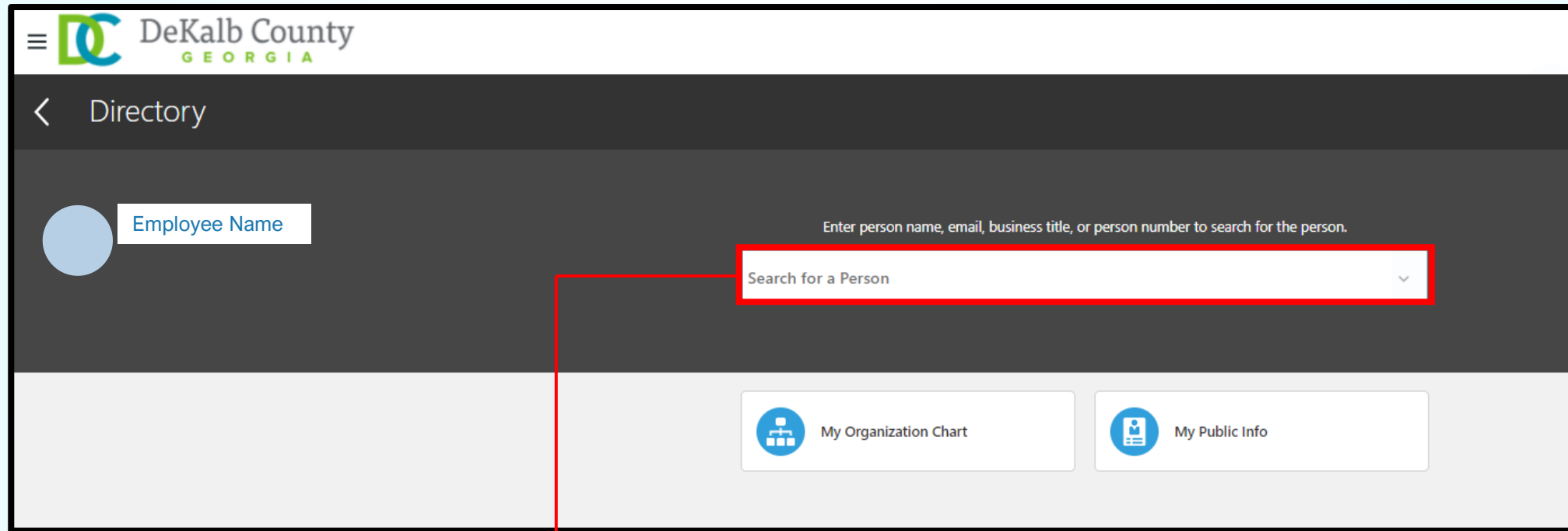
Verifying a Check-In Document

1 On the home page, navigate to the Me Tab



2 Select the Directory tile

Verify a Check-In Document



3

Enter name of employee in the search field and select from the dropdown list

Verify a Check-In Document

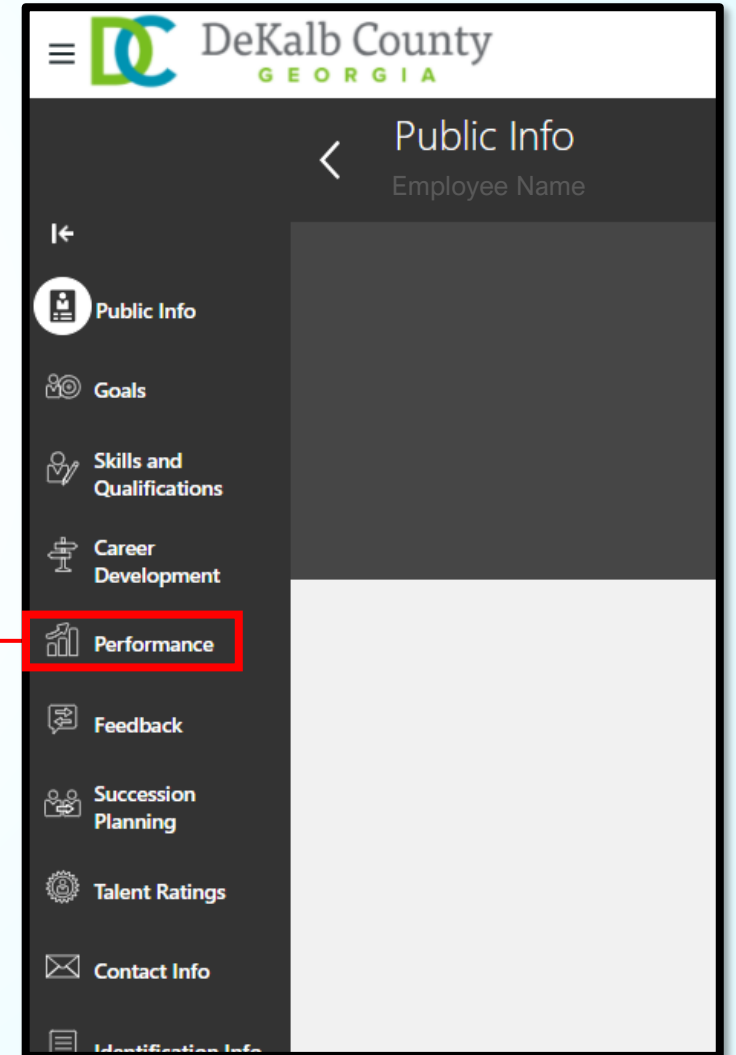


4

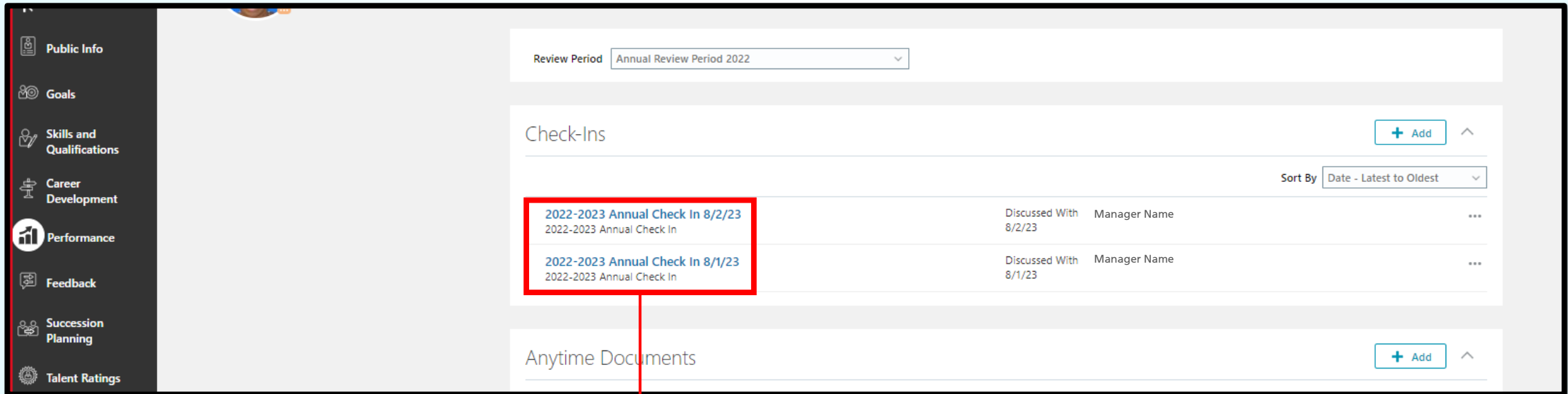
Select Show More from the list of options on the left

Select Performance

5



Verify a Check-In Document



Public Info

Goals

Skills and Qualifications

Career Development

Performance

Feedback

Succession Planning

Talent Ratings

Review Period: Annual Review Period 2022

Check-Ins + Add ^

Sort By: Date - Latest to Oldest

2022-2033 Annual Check In 8/2/23 2022-2023 Annual Check In	Discussed With 8/2/23	Manager Name	...
2022-2033 Annual Check In 8/1/23 2022-2023 Annual Check In	Discussed With 8/1/23	Manager Name	...

Anytime Documents + Add ^

6

Select the link for the desired Check-In Document



REMINDER

**This verification process is applicable for the Check-in Document only.
The Document Records upload is managed independently of this
verification process.**

Status Reports

CV360 reports available in near future - HR & Innovation and Technology

Two separate reports: one for Document Records uploads & one for Check-in Documents

Access rights to be determined



Adding a CV360 Employee Development Plan Document



CloudVergent 360

Development Plan Document

- Focuses on an employee's performance improvement
- Process

External CV360

- **Should have been completed**, if an employee received a rating of **Needs Improvement** or **Expectations Not Met** on their Annual Performance Document
- Upload via Document Records in CV360

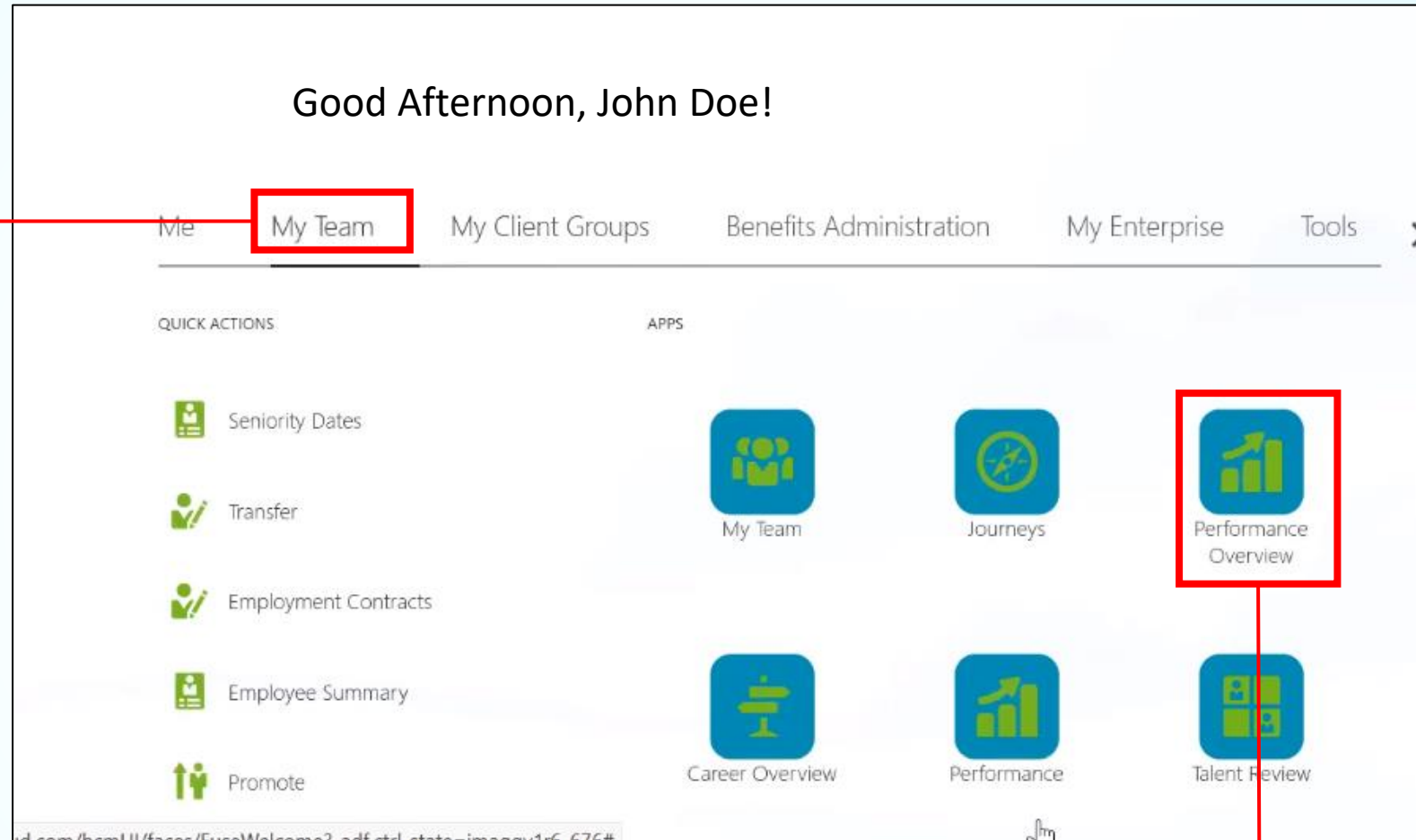
CV360

- Complete if a manager believes the employee's performance requires improvement
 - Viewed by manager, employee and Talent Administrator (HR)
 - Saves automatically when procedure is followed
- Responsibilities
 - Manager - Sets goals, evaluates performance and provides final feedback
 - Employee – Confirms commitment to meet expectation and acknowledges document

Adding a Development Plan Document

1

Select the **My Team** tab from the top of the CV360 Home page



Good Afternoon, John Doe!

Me **My Team** My Client Groups Benefits Administration My Enterprise Tools

QUICK ACTIONS

- Seniority Dates
- Transfer
- Employment Contracts
- Employee Summary
- Promote

APPS

- My Team
- Journeys
- Performance Overview**
- Career Overview
- Performance
- Talent Review

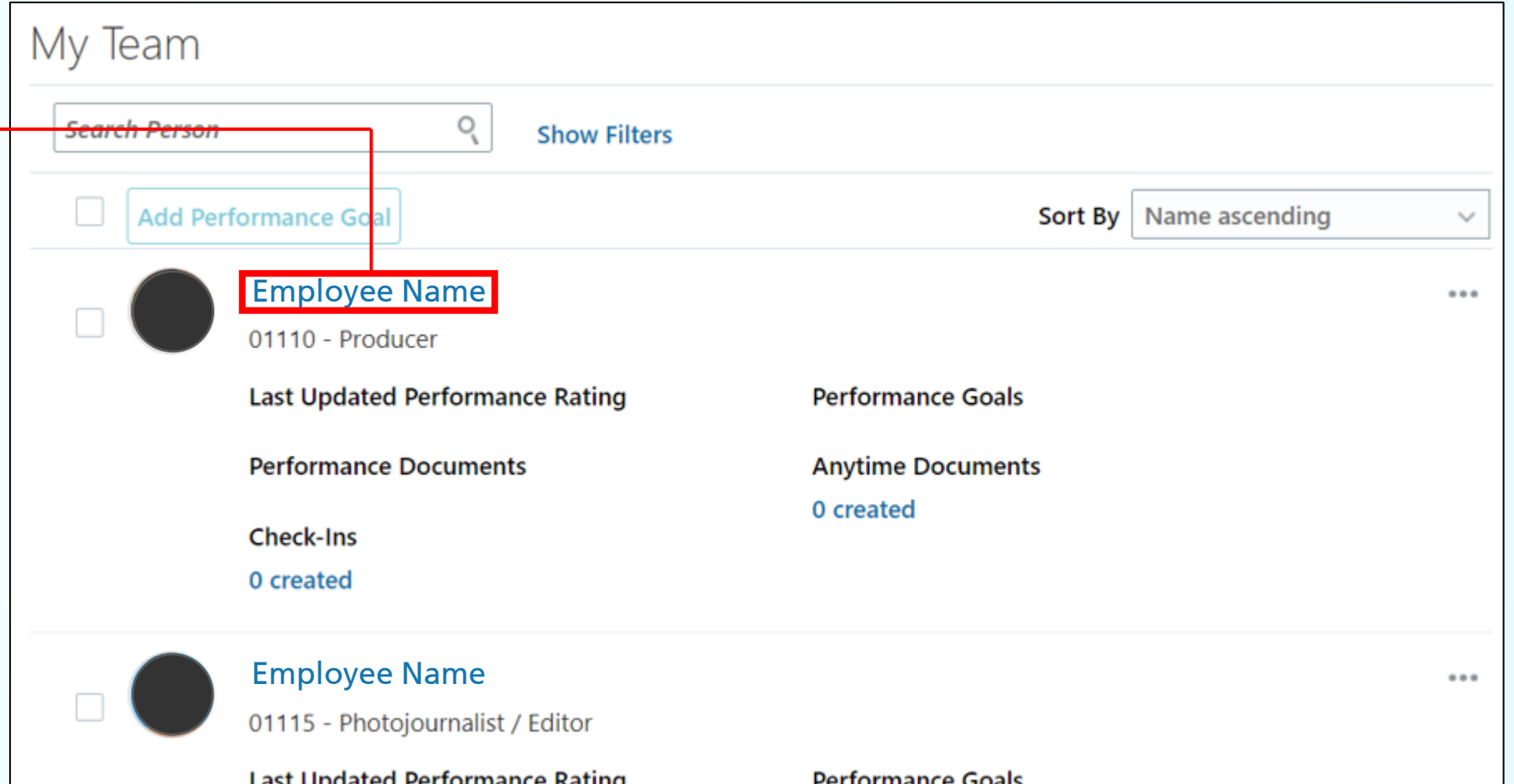
Select the **Performance Overview** tile from the Apps section

2

Adding a Development Plan Document



3

Click the hyperlink of the employee's name to start a development plan



My Team

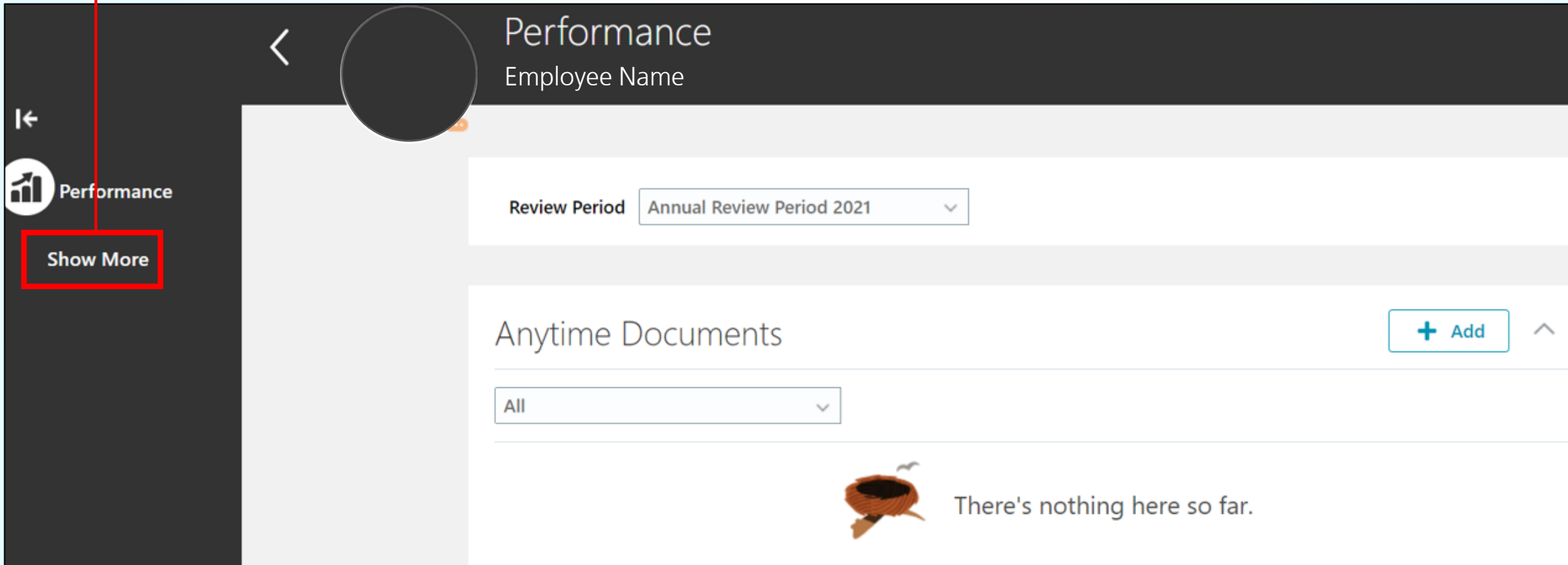
Sort By

<input type="checkbox"/>		Employee Name	...
		01110 - Producer	
		Last Updated Performance Rating	Performance Goals
		Performance Documents	Anytime Documents
		Check-Ins	0 created
		0 created	
<input type="checkbox"/>		Employee Name	...
		01115 - Photojournalist / Editor	
		Last Updated Performance Rating	Performance Goals

Adding a Development Plan Document

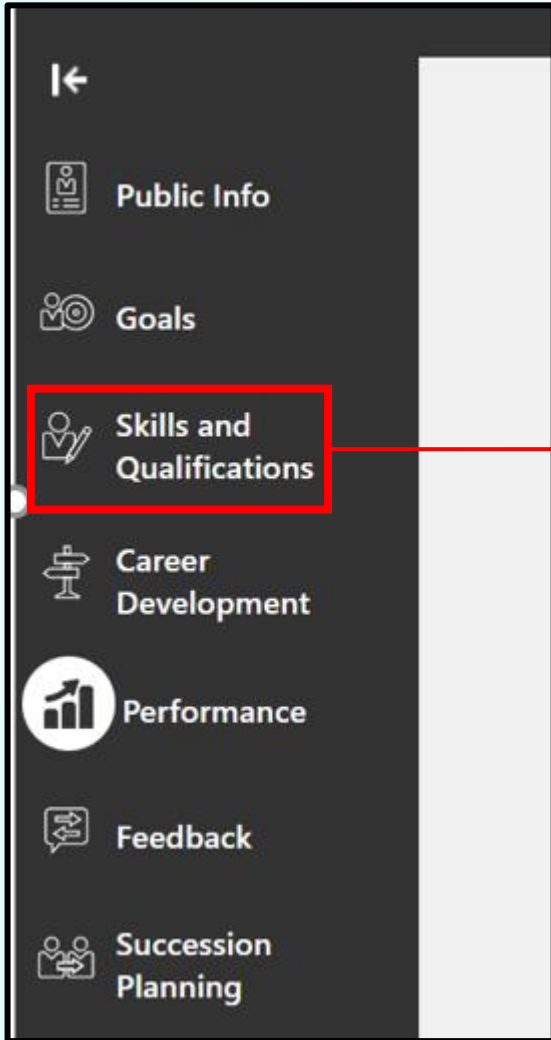
4

Click the **Show More** tab from the side bar to expand the employee's information



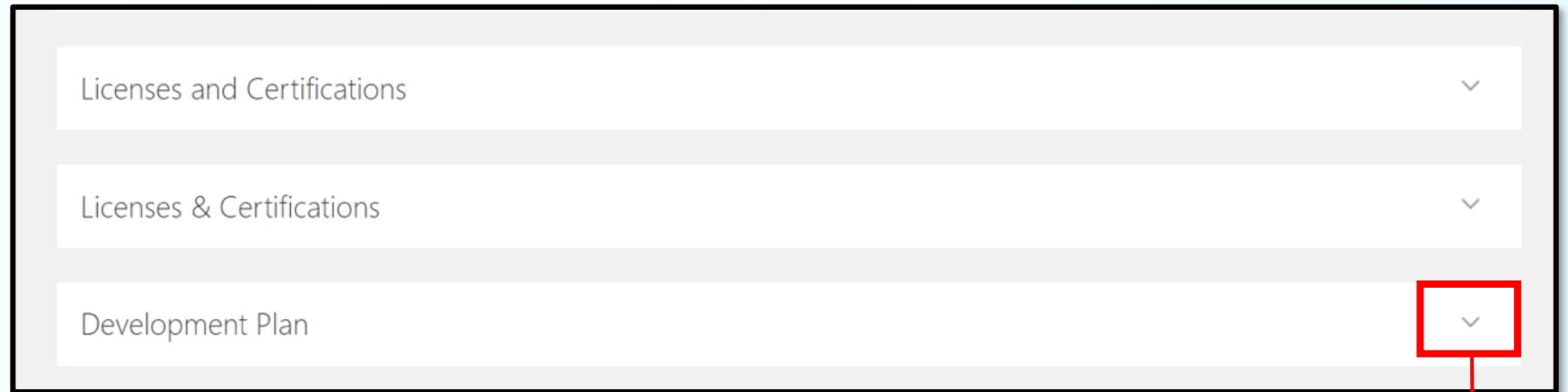
The screenshot displays the Performance app interface. On the left, a dark sidebar contains a 'Performance' icon and a 'Show More' button, which is highlighted with a red box. A red line connects the number '4' in the instruction to this button. The main content area shows the 'Performance' header with a back arrow and a profile picture placeholder. Below the header, there is a 'Review Period' dropdown menu set to 'Annual Review Period 2021'. Underneath, the 'Anytime Documents' section is visible, featuring a '+ Add' button and a dropdown menu currently set to 'All'. At the bottom of the screen, there is a message 'There's nothing here so far.' accompanied by a nest icon.

Adding a Development Plan Document



5

Click the **Skills and Qualifications** tab from the side bar

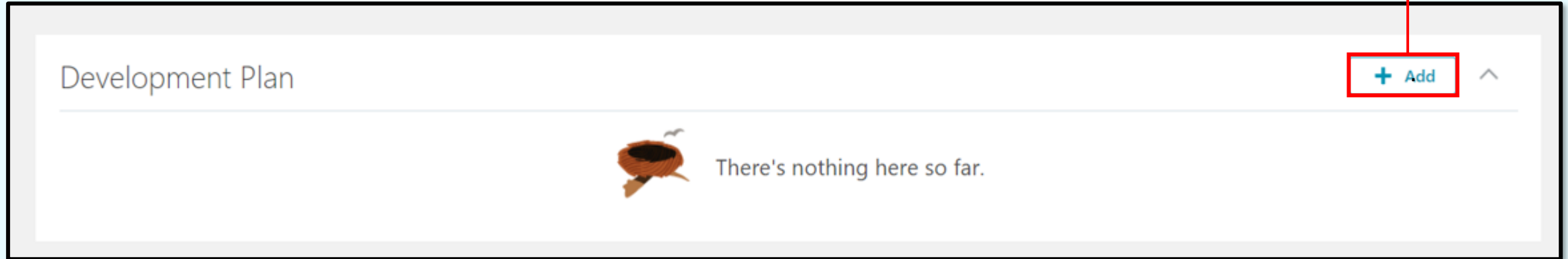


Scroll down the page to the **Development Plan** section and click the arrow to expand the section

6

Adding a Development Plan Document

Click the **+Add** button to add a development plan



Adding a Development Plan Document

Development Plan

Save Cancel

*Reason for PY Development Plan
Improvement

*PY Development Plan Template
PY 2022-2023 Development Plan - Manager

*PY Development Plan Document Required
Yes

8

Enter the information details for the development plan



Select **Yes** from the **Development Document Required** dropdown for development plan to be assigned to the employee

Click the **Save** button

9

Adding a Development Plan Document

10

View the development plan added for the employee in Document Records

Nonprimary

Primary

^ Assignment Status Clear

Active

Inactive


Suspended

^ Document Status Clear

In progress

Completed

Canceled

 **PY 2022-2023 Development Plan - Manager**

Employee Name

01110 - Producer

Current Task	Task Completion
Manager Evaluation of Employee Due 10/15/23	1 / 4

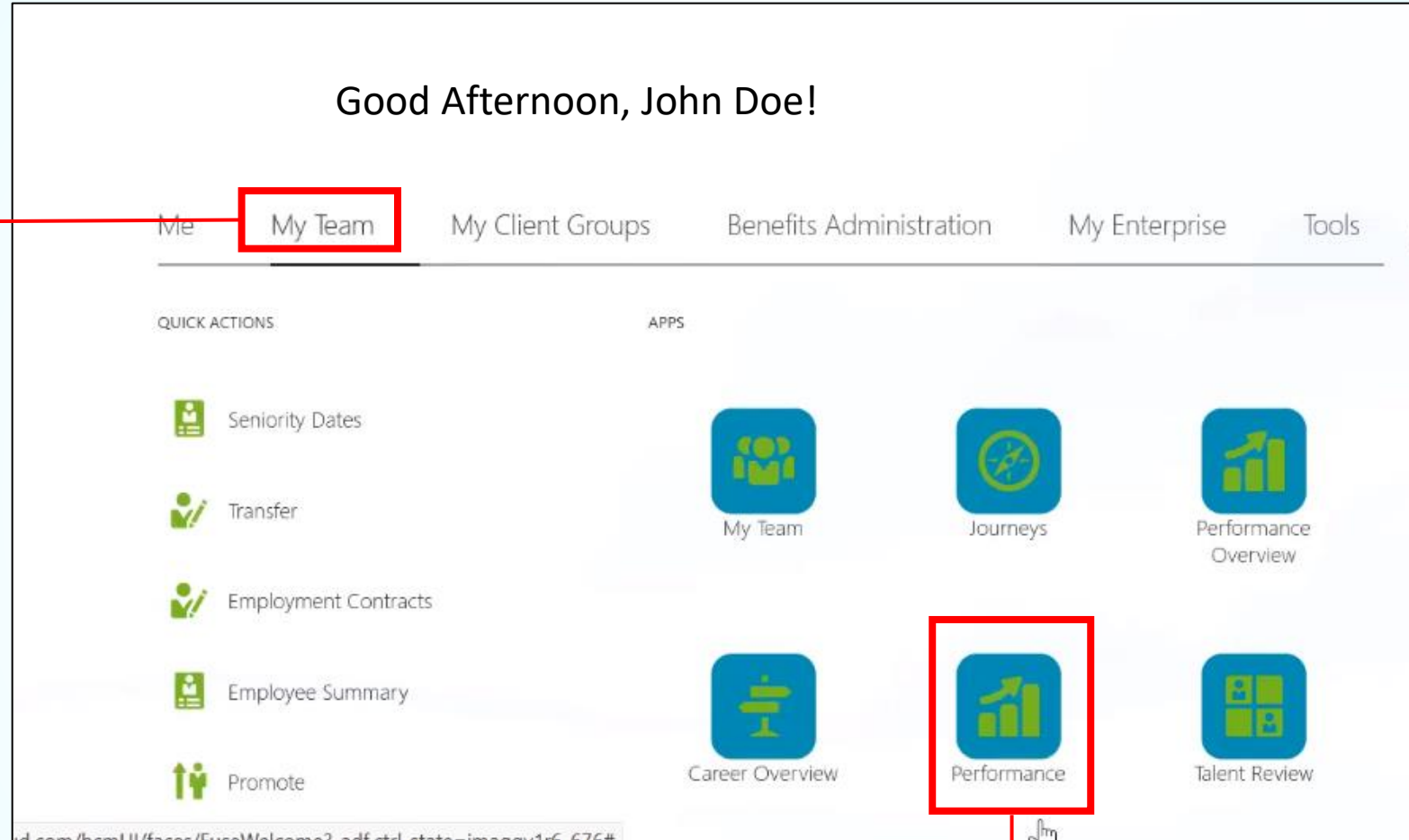


How to Complete a Development Plan

Completing a Development Plan

1

Select the **My Team** tab from the top of the CV360 Home page



2

Select the **Performance** tile from the Apps section

Completing a Development Plan



The screenshot shows a user interface for managing development plans. At the top, there is a filter section for 'Assignment Type' with a 'Clear' button and two checkboxes: 'Nonprimary' (unchecked) and 'Primary' (checked). Below this is a table with columns for 'Current Task' and 'Task Completion'. The first row of the table is highlighted with a red box around the 'Current Task' column, which contains the text 'PY 2022-2023 Development Plan - Manager Employee Name'. Below this text, it says '01110 - Producer'. The 'Task Completion' column for this row shows '1 / 4'. A blue arrow points from the red box to a callout box on the left. Another blue arrow points from the 'Current Task' text to a blue circle with the number '3' on the right, which is connected to a text instruction.

Current Task	Task Completion
PY 2022-2023 Development Plan - Manager Employee Name 01110 - Producer	1 / 4

3

Click the link of the Development Plan to be reviewed

Ensure the **Current Task** is indicated as **Manager Evaluation of Employee** in order to complete the process.

Completing a Development Plan



Evaluation Topics ^

Goals Evaluate

1 of 1 commented

Manager Comments

Excellent

Manager Feedback 4 Evaluate

Click the **Evaluate** button within the Manager Feedback section to begin evaluating the employee's overall performance

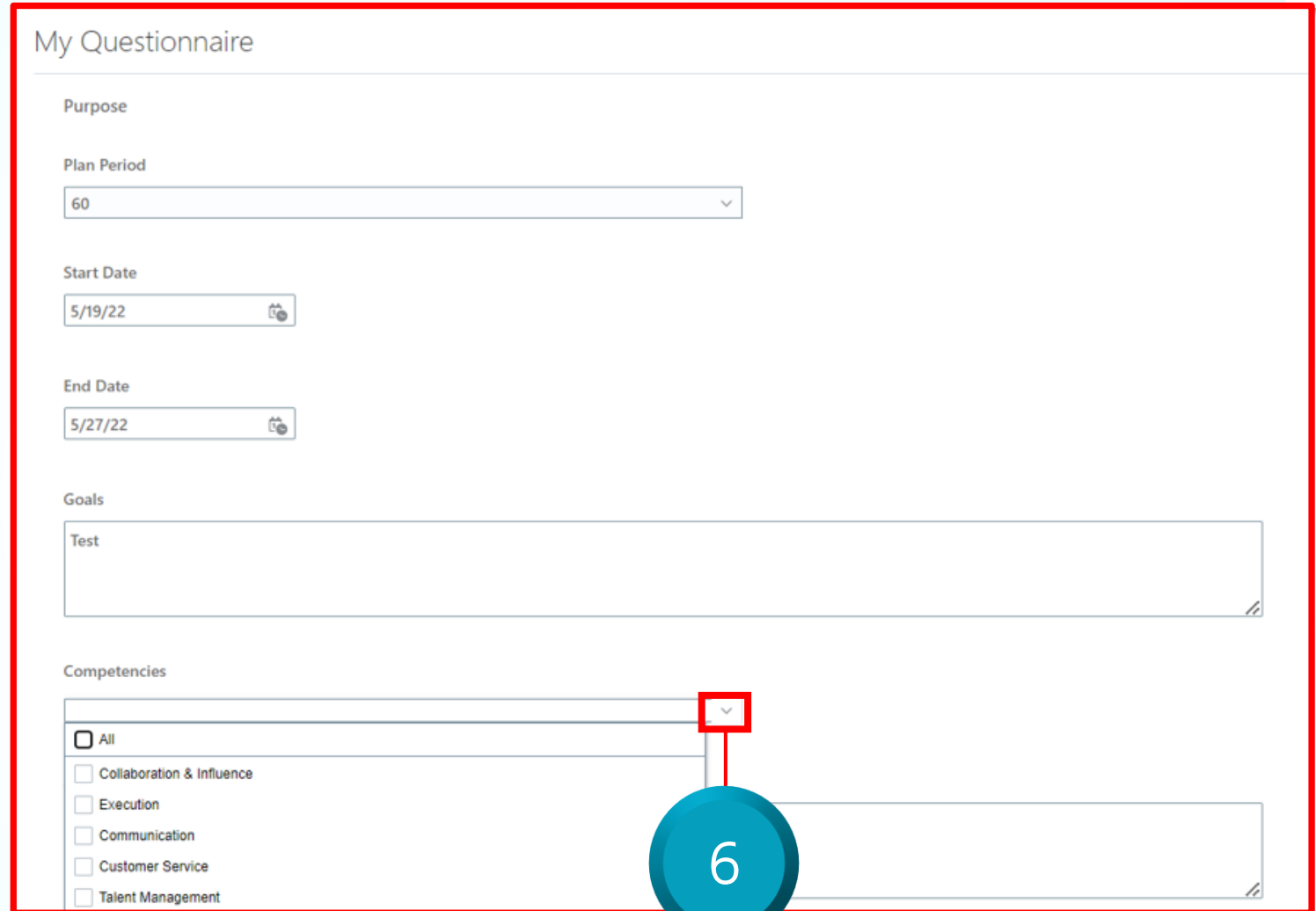
Completing a Development Plan

5

Enter the information for the questionnaire

Plan Period refers to the timeframe the development plan will be in effect (e.g., 60, 90 or 180 **days**).

Goals refer to the performance expectations the employee is trying to improve upon based the performance evaluation



My Questionnaire

Purpose

Plan Period
60

Start Date
5/19/22

End Date
5/27/22

Goals
Test

Competencies

All

Collaboration & Influence

Execution

Communication

Customer Service

Talent Management

Click on the dropdown under *Competencies* to select the competencies for the development plan

Job Categories

- Skilled/Semi-skilled
 - Paraprofessional (Non-Sworn)/Professional(Non-Manager)/Supervisor
 - Sworn Public Safety & Related
 - Sworn Public Safety Manager & Related
 - Manager
 - Executive/Senior Leaders
- Note: *List of job classifications assigned to specific categories will be maintained on the HR Intranet Webpage*

COMPETENCIES AND CRITICAL JOB ELEMENTS

CATEGORY	COMPETENCIES
Skilled/SemiSkilled	JOB SKILLS & KNOWLEDGE ACCOUNTABILITY SAFETY/COMPLIANCE CUSTOMER SERVICE DEPENDABILITY/ATTENDANCE
Paraprofessional/Professional/ Supervisor	EXECUTION COMMUNICATION COLLABORATION & TEAMWORK CUSTOMER SERVICE
Public Safety Sworn (excluding executive/senior leaders)	CUSTOMER SERVICE JOB SKILLS AND KNOWLEDGE ACCOUNTABILITY JUDGEMENT AND DECISION MAKING DEPENDABILITY/ATTENDANCE SAFETY /COMPLIANCE SUPERVISION
Manager	COLLABORATION & INFLUENCE EXECUTION COMMUNICATION CUSTOMER SERVICE TALENT MANAGEMENT
Executive/Senior Leader	ACTIVATES DEPARTMENT STRATEGIC DIRECTION LEADS THROUGH CHANGE SERVANT LEADERSHIP LEADS A SUCCESSFUL TEAM RESULTS FOCUSED

Managing Probationary Period Extensions

Note: The completion of a Development Plan **will not** substitute for a formal request to extend employee probationary period for 60, 90 or 180 days.

Department heads must request a probationary period extension *in writing* to the HR Director and/or Deputy Director and assigned HR Generalist.



Completing a Development Plan

Select the **Submit** button when you have finished the employee's development plan



Evaluation Topics ^

Goals Evaluate
1 of 1 commented

Manager Comments
Excellent

Manager Feedback Evaluate

Attachments ∨

Check-Ins ∨

! Employees will be able to view the manager's feedback. If necessary, you may add attachments and/or view check-ins by expanding the appropriate sections.





Helpful Hints



Helpful Hints



- ★ Use either Google Chrome or Firefox when working in CV360  
- ★ 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 Check-In 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 Check-In documents from the ellipsis (...)
- ★ Managers should have 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 Check-In Document

Review Period

Check-Ins + Add ^

Sort By

	Discussed With	Manager Name
2022-2023 Annual Check In 9/1/23 2022-2023 Annual Check In	9/1/23	

Select the ellipsis (three dots) to the right of the Check-In document, then select *Print*

...

Print

Delete

 Remember to NEVER select Delete!

Printed Check-In Example

Employee Name

2022-2023 Annual Check In 3/31/23A
Date 10/11/23
Discussed with Benita C Ransom
Review Period Annual Review Period 2022

Employment Details

Position	00232 - Human Resources Assistant	Job	15105 - Human Resources Assistant
Location	MALLOOF - Administration Bldg	Department	01510 - HUMAN RESOURCES & MERIT SYSTEM Manager

Questionnaire for Employee Name

Strengths - Identify performance indicators where you consistently exceed expectations/demonstrate accountability

- 1.Proficiently check the Director's calendar to support preparedness for meetings and tasks due dates with minimum errors
- 2.Developed a standard operating procedure to manage internal celebrations to build team morale.

Opportunities - Identify areas to help you be more successful in your performance and role

- 1.Set routine meetings with the Director's direct reports to remain current on current work projects and understand time and resource challenges
- 2.Take more initiative to familiarize myself with user department stakeholder in varied project types.

Accomplishments - Describe major performance contributions, accomplishments, and achievements during the performance cycle

- 1.Attained Associate PHR certification in February 2022
- 2.Successfully completed Excel Intermediate training to enhance my database management tasks.

Developmental Goals - Identify specific training or activity to complete to enhance performance

- 1.Meet with HR OED manager to seek project management training or skill development opportunities for discussion with the HR Director (my manager)

Career Goals - Identify goals to guide your professional growth in a desired area or to reach the next

County's HR
ilities obtained in the

ent in my current role as
oud of my relationship-

exceeds

engaging with the HR
stakeholders. She
eting schedule and other
C committee meeting and

efully in assigned role
nd other HR managers to
s to help manage the
de embracing SharePoint
ried tasks to ensure real-

, accomplishments, and

n in February 2023. This
nile working on her

complete to enhance

trainings will be

personal growth
unities to reach

ears and your

mber

le county phone

Use this link to log into the **My Apps** page of CV360:

<https://idcs-1b5172bd800b4d0cb6c0235505318175.identity.oraclecloud.com/ui/v1/myconsole>

The screenshot displays the 'My Apps' dashboard interface. At the top, there is a blue header with the title 'My Apps' and a search bar. Below the header, there are navigation options: '★ Favorites' and '+ Add'. A 'Sort' dropdown menu is set to 'Name'. The dashboard contains a grid of application tiles, each with an icon and a name. The tiles are:

- ADP Application (Icon: Cloud with code symbol)
- Benefits Microsite (Icon: Green square with document symbol)
- ERTD_DEV1 (Icon: Cloud with people symbol)
- ERTD_DEV2 (Icon: Cloud with people symbol)
- ERTD_DEV3 (Icon: Cloud with people symbol)
- ERTD_DEV4 (Icon: Cloud with people symbol)
- ERTD_PROD (Icon: Cloud with people symbol, highlighted with a red box)
- Primavera Cloud ... (Icon: Blue circle with cloud and document symbol)
- TALENT_TEST (Icon: Cloud with people symbol, highlighted with a red box)

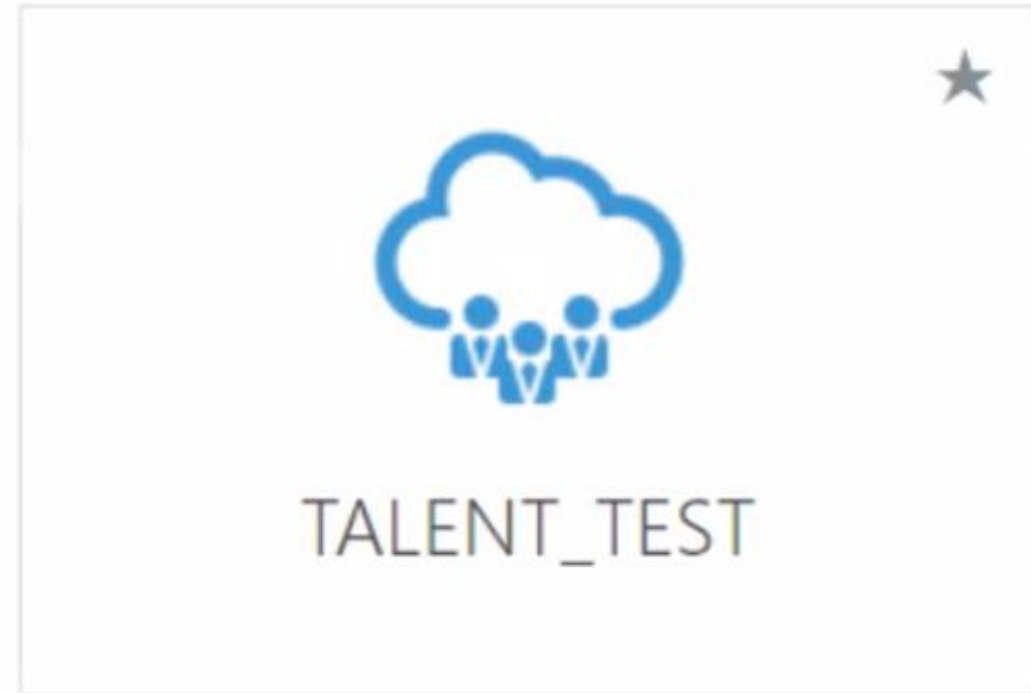
NEXT STEPS

Practice
Environment
For
All County Users

[TEST Pod](#) for all managers and employees!



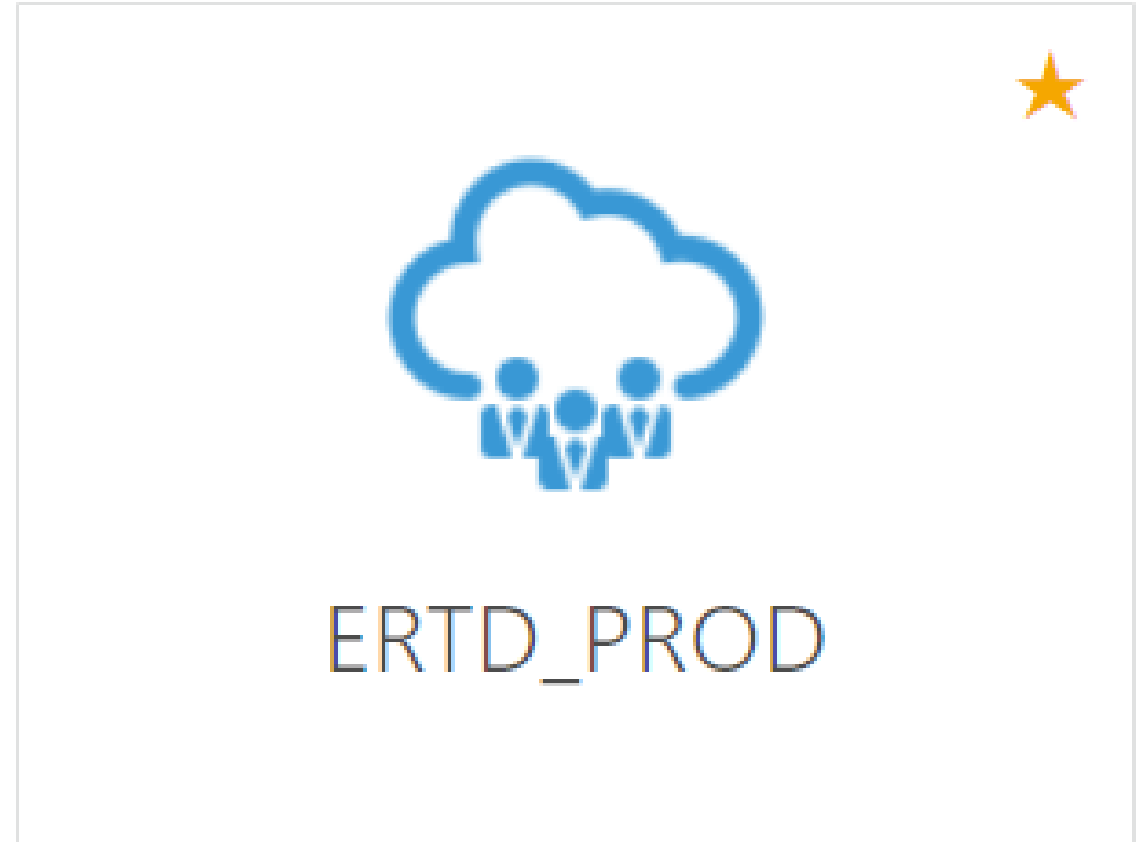
Right-click the link to open!



NEXT STEPS

Production
Environment
For
All County Users

ERTD_PROD is the live environment!



NEXT STEPS

Reminders

Training

- October 2023 – PY22/23
- November/December 2023 Kick-off – PY23/24 – Training & Enhancements
 - ✓ Organizational Goals (CEO Strategic Priorities)
 - ✓ Department /Division Goals
 - ✓ Rating Option

CV360 Submission

- Complete within CV360 no later than November 30, 2023
- HR determines department status via CV360 reports

Virtual Training (4 Hour –Sessions)

- ✓ Performance Feedback
- ✓ Coaching
- ✓ CV360 Roles
- ✓ Documentation

<i>Enroll via CV360</i> <i>Course Title: CV360 Performance Review Training (4-Hours)</i>		
Date	Time	Target Audience
10/11/23	1:00 pm – 5:00 pm	CV60 Performance Review Training (Talent Liaisons, Talent Coordinators & Department Heads Only)
10/12/23	9:00 am – 1:00 pm	CV60 Performance Review Training (Talent Liaisons, Talent Coordinators & Department Heads Only)
10/13/23	9:00 am – 1:00 pm	Open Enrollment – Line & Talent Managers
10/17/23	9:00 am – 1:00 pm	Open Enrollment – Line & Talent Managers
10/18/23	9:00 am – 1:00 pm	Open Enrollment – Line & Talent Managers
10/20/23	1:00 pm – 5:00 pm	Open Enrollment – Line & Talent Managers
10/24/23	9:00 am – 1:00 pm	Open Enrollment – Line & Talent Managers
10/25/23	9:00 am – 1:00 pm	Open Enrollment – Line & Talent Managers
10/27/23	1:00 pm – 5:00 pm	Open Enrollment – Line & Talent Managers
10/31/23	9:00 am – 1:00 pm	Open Enrollment – Line & Talent Managers

NEXT STEPS

DEPARTMENT HEADS & TALENT LIASIONS

prior to 11/30th
deadline

Department creates and distributes guidance communication

- ✓ Specifying job classifications to complete self-evaluations
- ✓ Sharing the Quick Reference Guide informing employees how to complete the self-evaluation
- ✓ Specifying timelines for managers to create check-in documents
- ✓ Emphasizing due dates
- ✓ Encouraging Talent Coordinators, Line Managers and Talent Managers to attend a scheduled training session

Training Documents



All training documents can be found on the [CV360 Training Hub](#), in the Performance Management section.

A navigation menu for the FAQ section. At the top is a search bar with a magnifying glass icon, the text 'FAQ', and a 'GO' button. Below this is a grid of nine categories, each with a representative image and a label. The 'Performance Management' category is highlighted with a red border.

Frequently Asked Questions		
CV360 Navigation	CV360 Help Desk	Employee Self Service
Manager Self Service	Payroll Coordinator	Hiring Manager
Leave Administration	Performance Management	Learning Management

Talent Management Resources

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

- [CV360 Training Hub](#)
- QRG (If applicable)

Communications

- Contact us at [**HRTalent@dekalbcountyga.gov**](mailto:HRTalent@dekalbcountyga.gov)

DeKalb Points of Contact

- Fabienne A. Niles | faniles@dekalbcountyga.gov
- Dr. Mel Campbell | mcampbell@dekalbcountyga.gov
- H. Kevin Opela | hkopela@dekalbcountyga.gov

Human Resources CV360 Talent Management Team



Benita C. Ransom
HR Director



Fabienne Niles
HR Manager



Katherine Furlong
HR Manager



H. Kevin Opela
HR Technical Trainer
Talent Administrator



Dr. Mel Campbell
OED Trainer
Talent Administrator



Karen Grant
HR Specialist
Talent Administrator



Chan Johnson
Employee Engagement Specialist
Talent Administrator



CONTACT US

Benita Ransom

Human Resources Director

bcransom@dekalbcountyga.gov

Dr. Mel Campbell

Employee Development Trainer

404-371-2107

H. Kevin Opela

Technical Trainer

404-687-3420

Karen Grant

Human Resources Specialist

404-371-2320

Chan Johnson

Employee Engagement Specialist

404-371-2849

Fabienne Niles

Organization & Employee
Development Manager

470-580-6531

Kay Furlong

HRIS Manager

470-580-6532



Evaluation

HR welcomes your feedback about today's learning experience.

Click link to submit your feedback or scan QR code with your phone.

- Email inbox
- Zoom/Teams chat box
- Name of training:
CV360 Performance Review Training



Thank you!

