PY 2024-25 Talent / Performance Management



CloudVergent 360

Training Goal

Learn how to effectively use the Anytime Document

Performance Year (PY) 24-25 Performance Review Process



CloudVergent 360

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 (<i>April 1st – March 31st</i>)	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



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: *For the Anytime Document process, the Talent Approver is an offline role.
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: <i>Administrative role only (does not have CV360 access rights for Talent Management) & may be a manager or Talent Coordinator</i>



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



2024-25 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 Performance Management 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











Create an Anyti Choose the Revie Performance D	ew Period and the ocument Name	5	Select the Save and Close b	Dutton
Add Anytime Docum	ent	<u>S</u> ave and Clo	se <u>C</u> ancel	
If the To Date field pre- populates with a date after 3/31/25, change it to 3/31/25.	*Review Period Annual Review Period 2024 *Performance Document Name 2024 – 2025 Annual Performance Review Document Description *From Date 4/1/24 *To Date 3/31/25 *Performance Document Manager			Note: The From ate and To Date fields must prespond to the appropriate Performance Year, i.e. from 1/24 to 3/31/25







	_
Document Details	
Evaluation Topics	
Annual Performance Evaluation Evaluate	
	Select the
Attachments	Evaluate button

8



ly Questionnaire	^
Organizational Goal Selection	
Select applicable organizational goal(s) from the list of values.	
All	
Public Safety: Ensure the safety of DeKalb County's residents.	
Retention, Hiring & Training: Enhance retention, hiring, and training efforts to ensure that the County maintains a v	vorkforce capable of sustaining positive mome
Community Health and Well-Being: Enhance the overall well-being of residents and employees.	
Beautification and Placemaking: Promote public well-being and foster community among residents.	
Sustain and Improve County Owned Assets: Maintain and improve upon County infrastructure	

From the dropdown, select the applicable organizational goals.



Department/Division Goals

Enter applicable Department/Division Goals.

Department Goals

9 Manually enter department goals in

the text box (free text or copy/paste)

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





Rating Instructions

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

<u>Option #1</u>: Rate individual goals only Note: *Do not complete an overall rating*.

<u>Option #2</u>: 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.





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 .

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





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	





In the upper right corner of the screen, select **Save and Close**





Adding Attachments





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

		<u>S</u> ave	<u>C</u> ance
0			
	Drag files here or click to add attachment v		1



Completing the Performance Evaluation







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 PY2024-25 performance evaluation using the Anytime Document Process.

Employee: > 90 days employed with County as of 3/31/25





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

How an Employee Completes the Anytime Document: Employee Questionnaire







Performance

Tools Others Щ Time and Pay Journeys Absences

Benefits

Current Jobs

Select the Career and Performance tile

Information





Δ



Anytime Document	S
All	\sim
2024 – 2025 Annual Perfo	ormance Review Document
Current Task	Task Completion
Employee Evaluation	Manager Name
All Tasks	
Manager Evaluation Employee Evaluation	

In the **Anytime Documents** section, select the performance document to be completed



Document Details	~	
Evaluation Topics	^	
	Evaluate	Select the
Attachments	\sim	Evaluate button

Employee Acknowledges Receipt of Feedback/Evaluation











Add any comments in the **Comments** field





In the upper right corner of the screen, select **Save and Close**

Save and Close

<u>C</u>ancel

Completing the Performance Evaluation







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.

After creating the Check-in Document, select Bypass Self-Evaluation	
Employee Evaluation: 2023 – 2024 Annual Performance Print Bypass Self-Evaluation	
ment Details	Select the Bypass Self-Evaluation button

Employee Declines to Acknowledge Receipt



Using the Check-In Document Process to document Performance conversations



Create a Check-In Document



- 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 Probation Evaluations
- Check-In Documents may be used 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.
- Manager completes *Manager Questionnaire* to provide constructive feedback to employee.
- Employee completes the *Employee Questionnaire* to provide their perspective.
- 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.



Create a Check-In Document



Search Per	rson Q Show Filters			
Add	l Performance Goal	Sort By Name as	cending ~	Select the ellipsis ar
	Employee Name 15070 - Human Resources Specialist Last Updated Performance Rating Performance Documents Annual - Executive/Senior Leaders V1 Check-Ins	Performance Goals 0 of 0 completed Anytime Documents 0 created Add	d Anytime Document	Add Check In Document option fro the drop-down list ne to the appropriate employee name
	Employee Name 15050 - Employee Development Trainer	Fee	edback	

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





Create a Check-In Document

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

Check-In Scheduled	Note: CV360 does not create a scheduled even and the Agenda function is NOT enabled
Hello Employee	
Your Manager scheduled a check-in for you. Review the agenda and add discussion topics as required.	
Thank you.	Check-In Document Created
	Hello, Employee
You and Your Manager Check-in Date: 2023/03/31	Your Manager created your PY 2024-25 Performance Document. comments.
Go to Check-in	Thank you.
Agenda	Review Period
agenua	Check-In Date
	Check-in remplate



Review and add any

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.

How a Manager completes a Check-In Document







My Team						
Search Person	۹ Show	w Filters				
Add Perf	formance Goal		Sor	t By	Name ascending	\sim
	Employee Name 15050 - Employee Developme	ent Trainer				
	Last Updated Performance Rat	iting	Performance Goals			
	Performance Documents		Anytime Documents			
	Check-Ins 1 created Last on 3/31/25		2 created			



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

4



Review Period Annual Review Period 2024	\checkmark
Check-Ins	► Add
	Sort By Date - Latest to Oldest 🗸 🗸
2024-2025 Annual Check In 3/31/25 2024-2025 Annual Check In	Discussed With Manager Name •••• 3/31/25

Select the link for the desired 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 meting 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





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			
	 	 	 /



Manager Questionnaire

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

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

8

Save



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



General Discussion Topics		
*General Discussion Topic New topic Note Discussed the importance of being on time and not leaving early.	*Topic Name Attendance	Enter the appropriate information and select the Save button
	Words: 11 Characters (with HTML): 71	on Tonics:
i Em	ployees can only view.	





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 <u>HRTalent@dekalbcountyga.gov</u>.

- Employees and managers *must use* the Edit button!
- NEVER use the Delete button!

Talent Coordinators: How to Verify Submission of Anytime & Check-in Documents







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









≡ DeKalb County	
C Directory	
Employee Name	Enter person name, email, business title, or person number to search for the person. Search for a Person
	My Organization Chart My Public Info
	Enter name of employee in the search field and select from the dropdown list







Anyti	me Documents						+ Add	^
	Transfer					All		~
	2024 – 2025 Annual Perfor	rmance Review Document		iles				
	Current Task Manager Evaluation All Tasks Manager Evaluation Employee Evaluation		Task Completion	0 / 2	Manager Name Manager Name			
	6	Select the li Anytim	nk for the desired ne Document					

Records Maintenance, Storage & Administration



Personnel Records

- Required documentation after 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

🔰 Use either Google Chrome or Firefox when working in CV360 🤦



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 Anytime 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 Check-In Document



≡ 🚺 DeKa	lb County		Print
<	Employee Evaluation: 2023 – 2024 Annual Performance Review Docu	Print Print	
	Document Details	~	Select the Print button at the top
	Evaluation Topics	View	right of the Anytime Document
		view	
	Attachments	×	

Talent Management Resources

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

- <u>CV360 Training Hub</u>
- QRG (If applicable)

Contact us at <u>HRTalent@dekalbcountyga.gov</u>