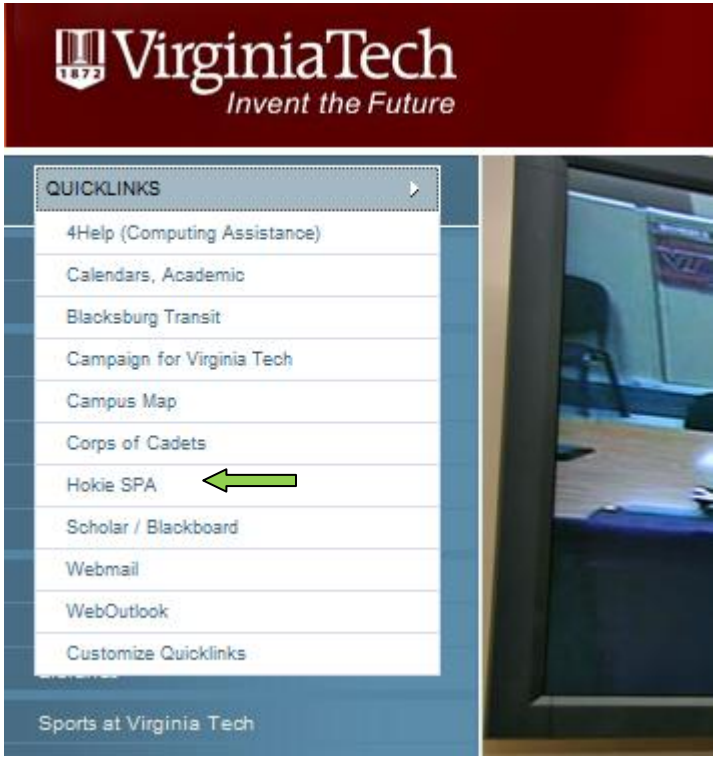
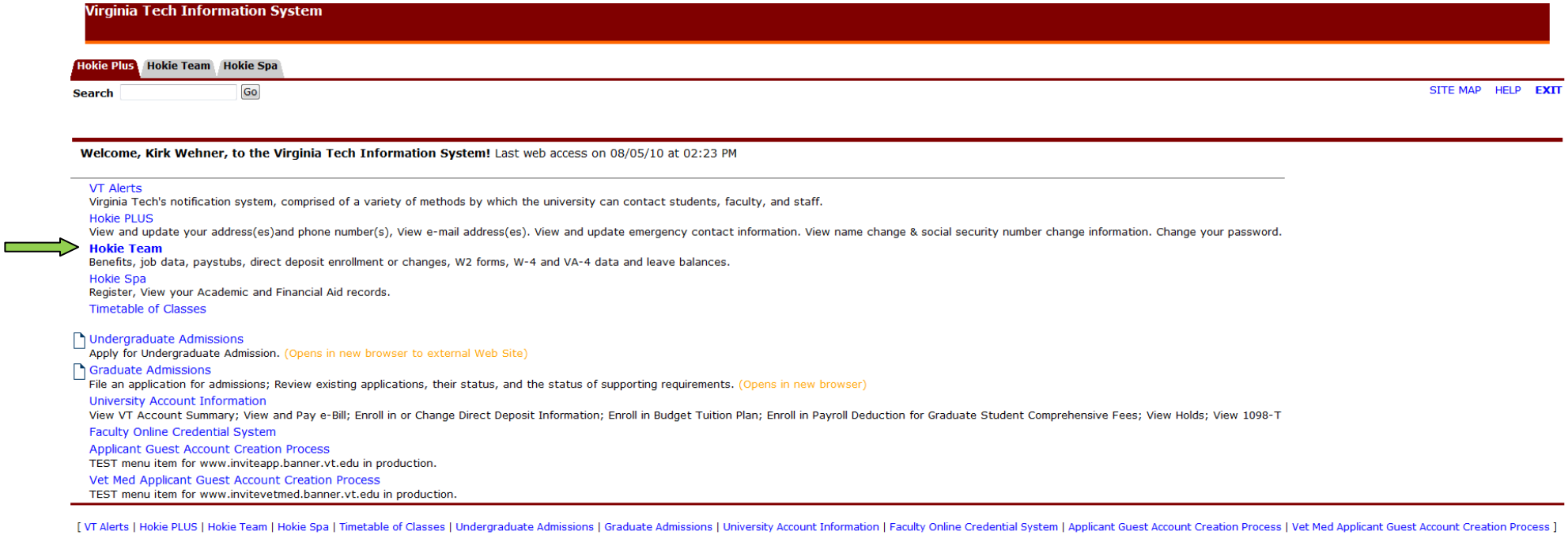
Getting Started

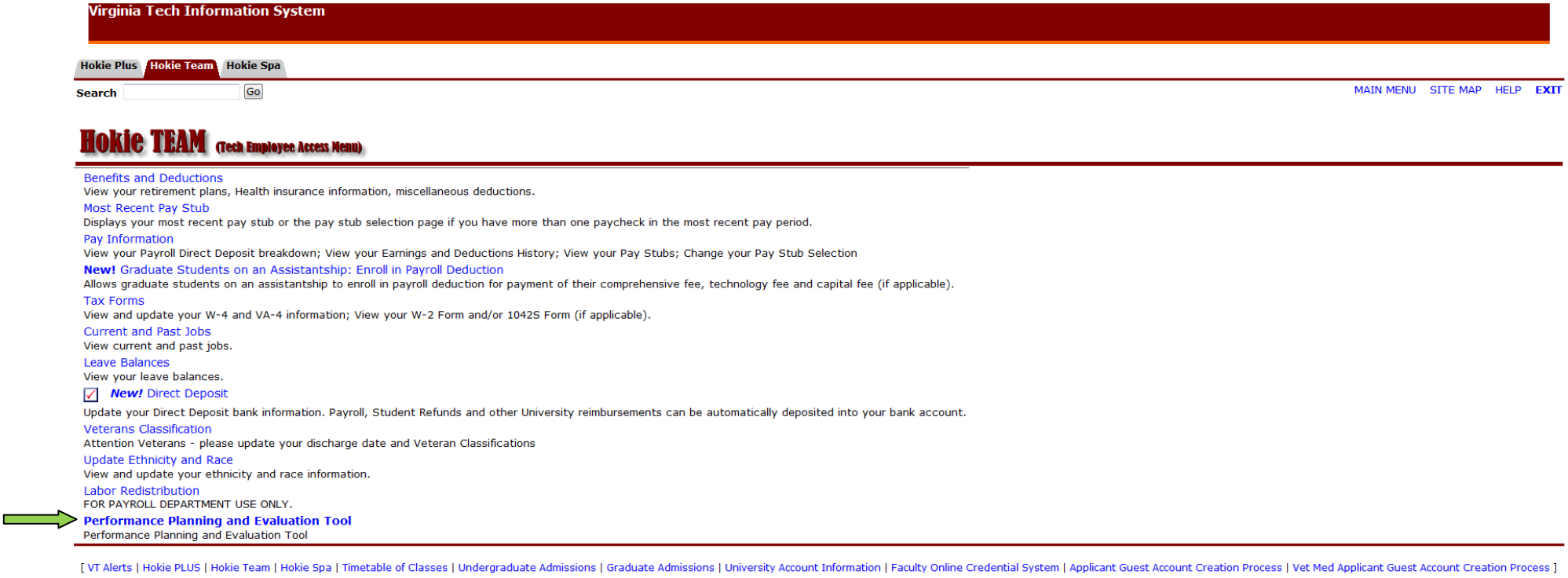
The first step to access the performance management tool is to go to Hokie Spa. There are several ways to do this but one of the simpler ways is just to go to Quicklinks on the VT Home page and select Hokie Spa



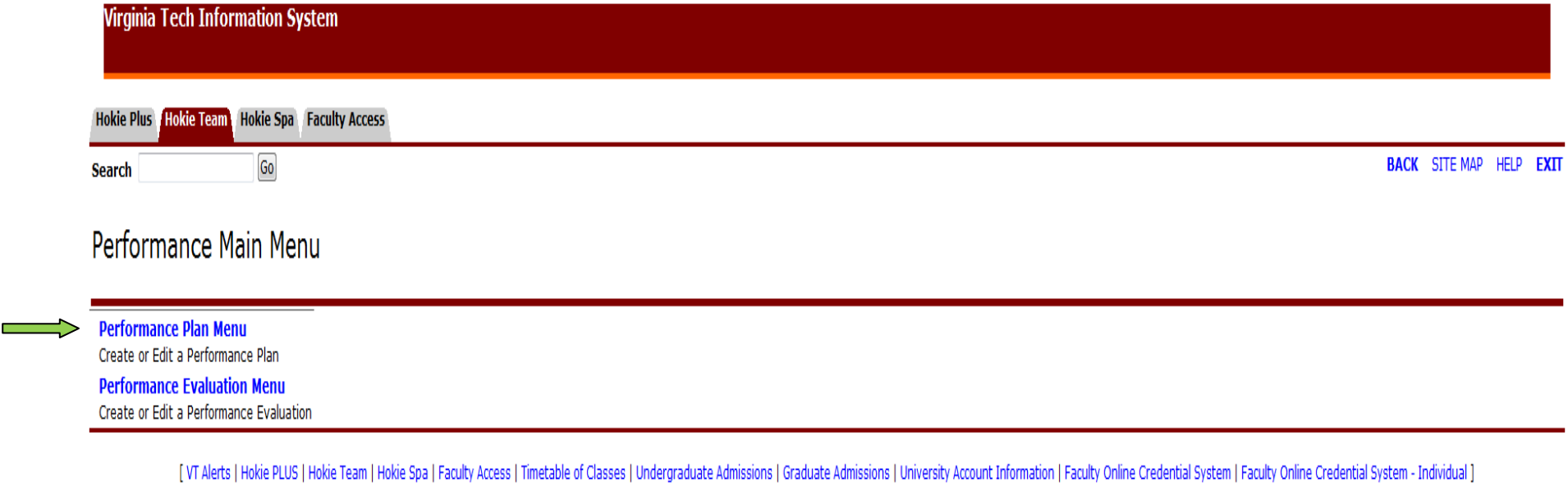
Once you have entered your PID and password, the system will bring you to the screen below. Here you will want to choose “Hokie Team”



After selecting “Hokie Team” the screen below appears and you will want to select Performance Plan and Evaluation Tool – towards the very bottom of the screen.



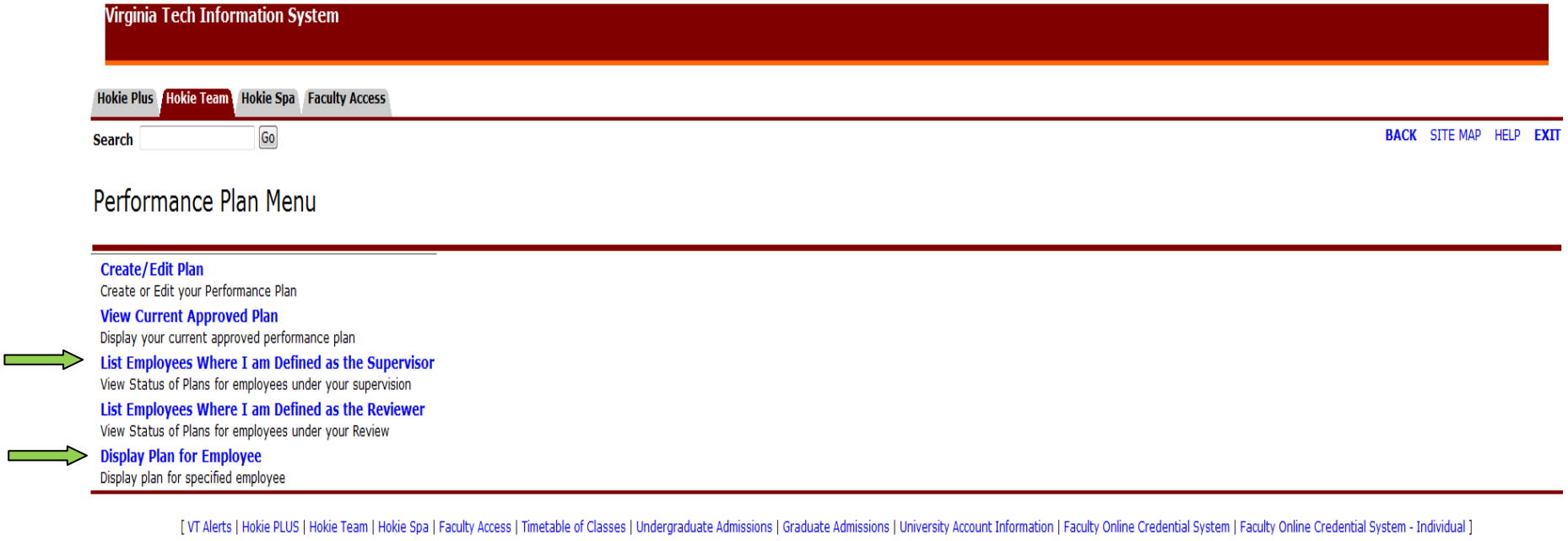
To create a performance plan for an employee the supervisor must first select “Performance Plan Menu”



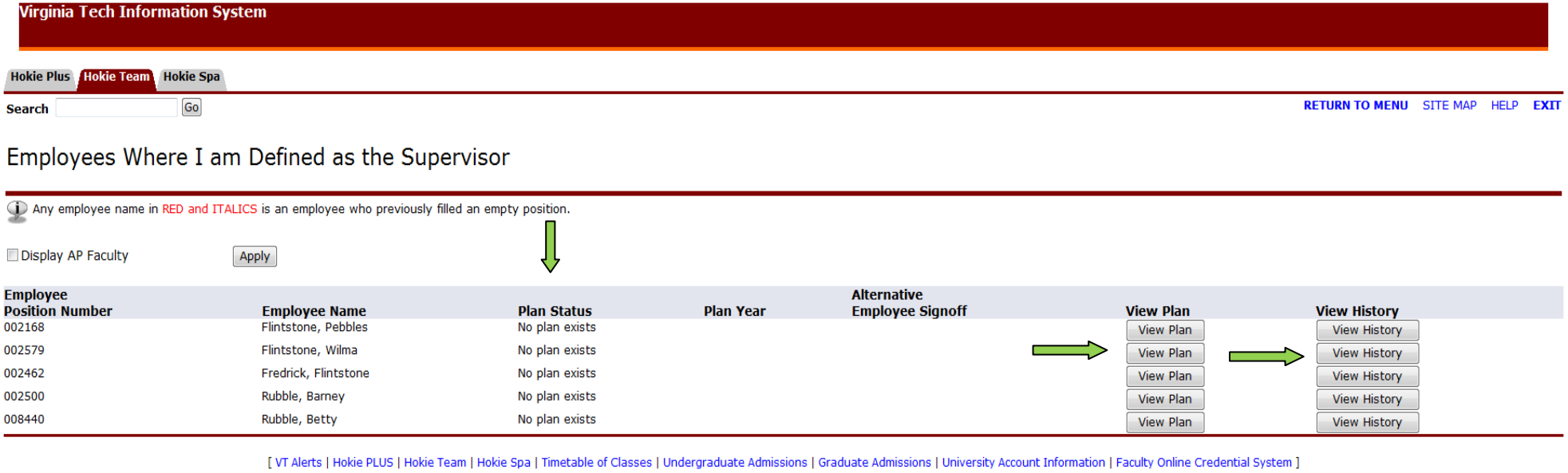
As a supervisor, when you select “Performance Plan Menu” you will see the menu below.

To create your own performance plan you would select Create/Edit Plan.

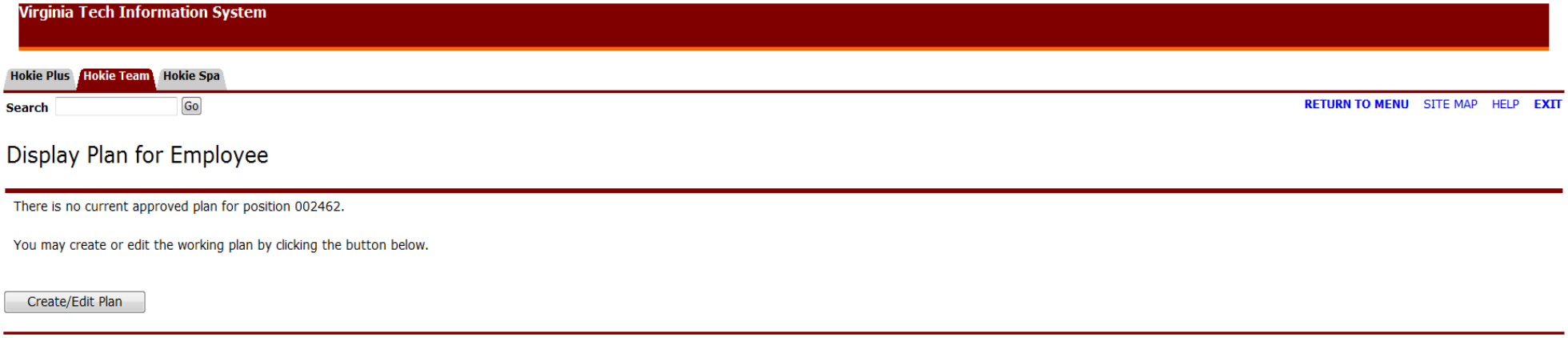
To create a performance plan for one of your employees you can select “**List Employees Where I am Defined as the Supervisor**” or you can select “**Display Plan for Employee**”



If you select "**List Employees Where I am Defined as the Supervisor**" you will see the screen below. This exercise will take us through creating a performance plan for Fredrick Flintstone. You can see the current status (under the Plan Status heading below) is "No Plan Exists". To create a plan you have two options. You can select "View Plan" or you can select "View History". The results of each of those choices are outlined in the next pages.



By selecting “View Plan” the screen below will appear. Since this is the first time the plan has been accessed selecting the “Create/Edit Plan” button will allow you as the supervisor to create a plan from scratch.



If you select “View History” and there are prior performance plans in the system you will be able to select “View Plan” and see the screen below. Note the buttons at the bottom of the screen which allow you to create a plan for a new year by copying last year’s plan or update a current approved plan do to a change in goals, etc.

Virginia Tech Information System

Hokie Plus | Hokie Team | Hokie Spa

Search Go

RETURN TO MENU SITE MAP HELP EXIT

Performance Plan

Name: Fred Flintstone
ID: 905601550
Dept./Org.: Department of Human Resources
Supervisor: Kirk Wehner

Position: 002462
Job Title: Benefits Manager

Year: 2010

Goals:
- **Goal 1:** This is a test
  - **Metric 1:** This is a test
  - **Metric 2:** This is a test
- **Goal 2:** This is a test
  - **Metric 1:** This is a test
  - **Metric 2:** This is a test
- **Goal 3:** This is a test
  - **Metric 1:** This is a test
  - **Metric 2:** This is a test

Universal Competencies:
- Teamwork
- Maintaining a Safe & Secure Work Environment
- Diversity Commitment

Job Specific Competencies:
- Adaptability & Flexibility
- Analytical Skills & Problem Solving
- Communication Skills
- Job Knowledge & Technical Competence

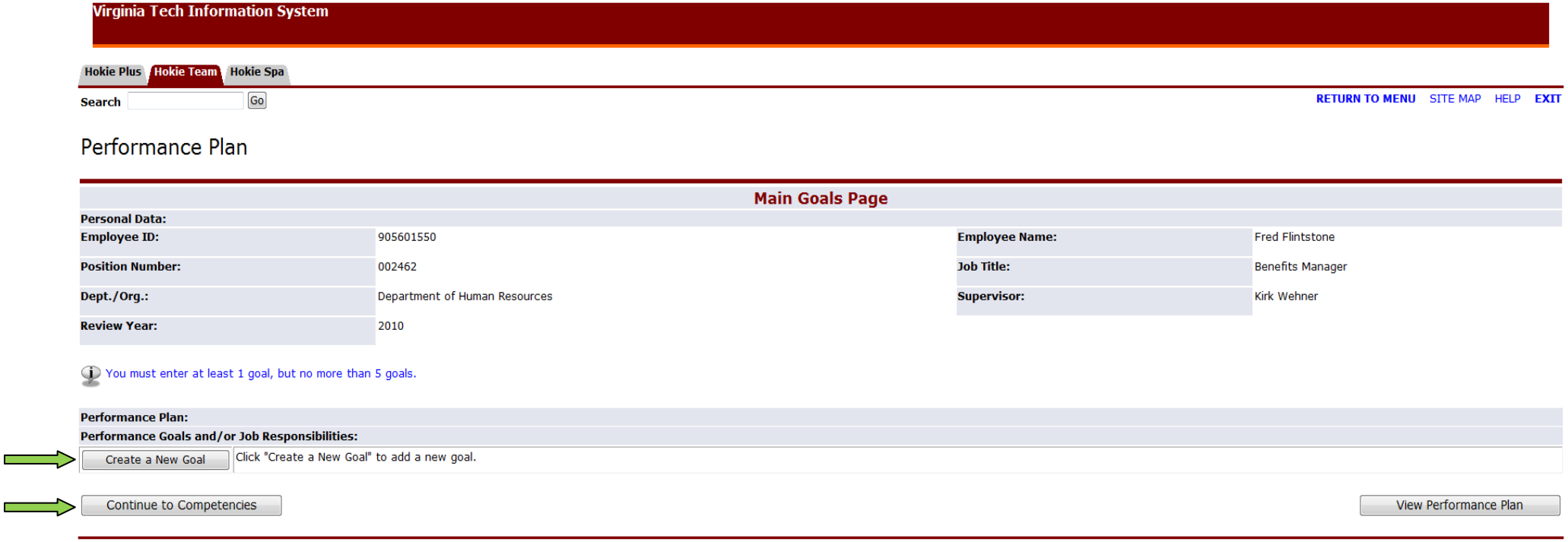
Career Development Plan:

Employee:
No items for Career Development

Supervisor:

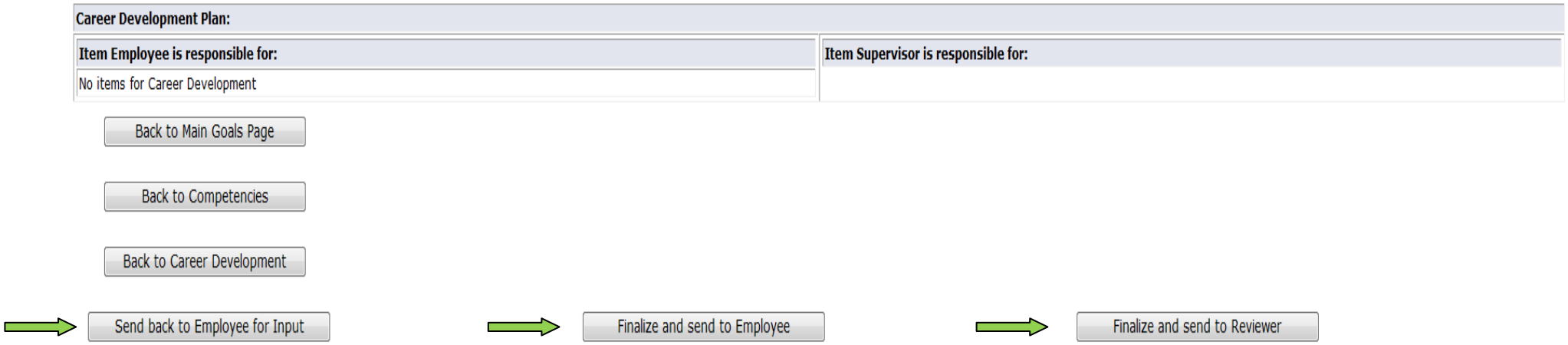
Copy to Next Plan Year | Update Current Plan | History by Employee | History by Position

Once you have selected “Create/Edit Plan” you will see the screen below. The actual creation of the plan is very simple. You select the “**Create a New Goal**” button, and type in (or copy and paste from another document) the one to five goals and associated metrics for the employee. When you are finished entering the goals you can save and exit or select “**Continue to Competencies**”. Selecting the 3-5 competencies for your employee requires no typing, simply click on the box next to the competency and it is added to the plan.

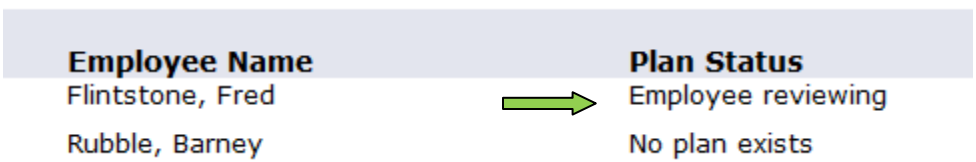


Once you have entered the goals & metrics, selected the competencies and defined development expectations, you will be able to click on the “**View Performance Plan**” button (see above) which will give you several different options which you will see on the next slide.

What you see below is at the bottom of the screen that appears after you select the "**View Performance Plan**" button. There are several options. You can continue to modify the plan or, if you are finished you have one of three options. You can select "**Send back to Employee for Input**", you can select "**Finalize and Send to Employee**" or you can select "**Finalize and send to Reviewer**".



If you select "**Send back to Employee for Input**" the employee will be able to edit the performance plan and then return it to you for approval or for further modifications. You can repeat these steps (Supervisor sends to Employee for Input, Employee returns to Supervisor with any changes) as many times as it takes for you to be satisfied with the plan. You will know where the plan is in the process based on the "Plan Status" column of the "**List Employees Where I am Defined as the Supervisor**" screen that was reviewed on page 6. The plan status will have changed from "No Plan Exists" to "Employee Reviewing"



This represents just a portion of the "List Employees Where I am Defined as the Supervisor" screen shown on page 3.

Once the employee has looked at the plan and provided input (they can just send the plan back to the supervisor without any changes), the “Plan Status” changes from “Employee Reviewing” to “Supervisor Editing”.

Employee Name	Plan Status
Flintstone, Fred	**Supervisor editing**

The Supervisor can now select “View Plan” (see page 6), make any additional modifications and, assuming they are satisfied with the plan and ready to approve they can select the “**Finalize and Send to Reviewer**” button OR the “**Finalize and Send to Employee**” button. The supervisor would only need to select the former if the Reviewer has asked to see the performance plan prior to the final version being sent to the employee. Otherwise, the supervisor can select “**Finalize and Send to Employee**” at which point the Plan Status will change to “Supervisor Approved”. The employee will be able to view the final plan (but not edit it) and then acknowledge receipt of the final plan via a button at the bottom of the performance plan.

Once the employee has acknowledged receipt **the Performance Plan is final** and the Plan Status changes to “Employee Approved”

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RETURN TO MENU SITE MAP HELP EXIT

Employees Where I am Defined as the Supervisor

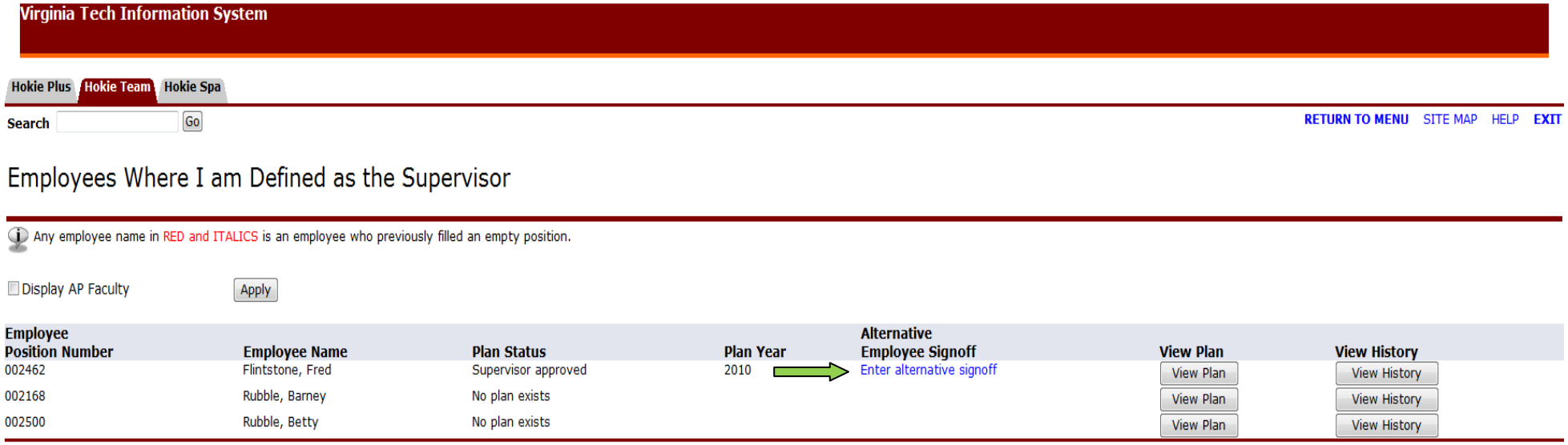
Any employee name in RED and ITALICS is an employee who previously filled an empty position.

Display AP Faculty Apply

Employee Position Number	Employee Name	Plan Status	Plan Year	Alternative Employee Signoff	View Plan	View History
002462	Flintstone, Fred	Employee approved	2010		View Plan	View History
002168	Rubble, Barney	No plan exists			View Plan	View History
002500	Rubble, Betty	No plan exists			View Plan	View History

That completes the Performance Plan process for Fred Flintstone.

However, a situation may arise where an employee did not have access to a PC or for some reason did not have access to the plan and/or refused to acknowledge receipt. In this case the Supervisor can simply to the "Employees Where I am Defined as the Supervisor" menu item and select "Enter Alternative Sign Off". This allows the supervisor to indicate that there is a singed paper copy of the performance plan or that the employee could not or did not sign the plan.



Once the supervisor has selected this option, the Plan Status in List Employees Where I am a Supervisor is changed to reflect the option chosen: