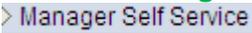
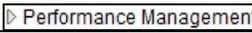
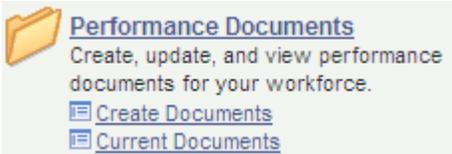
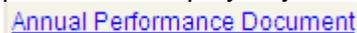


## SUPERVISOR INSTRUCTIONS ON HOW TO FINALIZE A PERFORMANCE PLAN

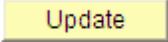
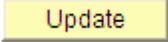
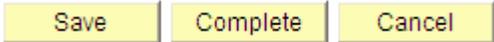
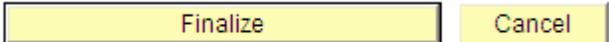
Create Draft Plan ⇒ ADD CONTENT TO PLAN & FINALIZE PLAN

### How to Finalize a Performance Plan

Step	Action	Notes
(1)	Login to PeopleSoft <a href="https://pshcm.dc.gov">https://pshcm.dc.gov</a>	
(2)	Click the <b>Manager Self Service</b> link. 	
(3)	Click the <b>Performance Management</b> link. 	
(4)	Click the <b>Current Documents</b> link located under Performance Documents. 	
(5)	Click the <b>Annual Performance Document</b> link associated with the plan of the employee you would like to work on. 	
(6)	Click the <b>Start</b> or <b>Edit</b> link to open the plan.	<b>An employee may add content to a draft performance plan up until the point that it is finalized by her/his supervisor.</b>
(7)	Scroll down to the Competencies Section and then click the <b>Add Competency</b> link to view the instructions and add competencies to the plan. 	Supervisors have <u>8</u> core competencies, and a maximum of 3 more competencies can be added.  Non-Supervisors have <u>5</u> core competencies, and a maximum of 3 more competencies can be added.
(8)	Click the <b>Update</b> or <b>Save Select Competencies</b> button to save the content added to the plan.	Click the <b>Save</b> button frequently to save your work.
(9)	Scroll down to the S.M.A.R.T. Goals section and then click the  icon to view the instructions and develop content.	A minimum of <u>3</u> S.M.A.R.T. Goals is required, and a maximum of 2 more S.M.A.R.T. More goals can be added.

## SUPERVISOR INSTRUCTIONS ON HOW TO FINALIZE A PERFORMANCE PLAN

Create Draft Plan ⇒ ADD CONTENT TO PLAN & FINALIZE PLAN

How to Finalize a Performance Plan		
Step	Action	Notes
(10)	Click the <b>Update</b> button to save the content added to the plan. 	
(11)	Enter weights in the text box of each S.M.A.R.T. Goal. Weight: <input type="text" value="0"/> %	Each goal must have a weight of at least 10%, and the total weight should sum to 100%.
(12)	Scroll down to the Individual Development Plan section and then click the  icon to view the instructions and develop content.	A minimum of <u>1</u> Individual Development Plan (IDP) is required, and a maximum of 2 more IDP's may be added.
(13)	Click the <b>Update</b> button to save the content added to the plan. 	
(14)	Scroll down to the Probation section and then click the  icon to select the status of the employee.	
(15)	Click the <b>Complete</b> button. 	Click the <b>Complete</b> button <i>after</i> you have discussed the performance plan with your employee.
(16)	Click the <b>Finalize</b> button. 	Clicking the <b>Finalize</b> button will generate an email notification to the employee informing her/him that s/he can access a read only version of the finalized plan.  <b>Use Performance Notes to document your employee's performance. The comments fields will become available in the evaluation phase.</b>

**Supervisors can modify a finalized plan by reopening it: Click the **View** link and then click then the **Reopen** button. If a plan is reopened it must be re-finalized.**