prm CONSULTING GROUP

Performance Management System
Self-Service Website
User Guide

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I. Performance Management Self-Service Website Functionality

Performance Management Website Functionality

The information in this section will assist you in navigating through the Performance Management System Self-Service Website.

A. Login Screen

The Performance Management System can be accessed via the following URL address: http://prm-solutions.com/prmpms/.

Login credentials will be provided by a PRM Consulting Group (PRM) representative.

Figure 1

NOTE: When navigating the website, you can access the login screen by pressing the *Home* button.

B. Welcome Screen

After you log-in, the "Welcome Message" page will load by default. (Figure 2). The System Administrator can update the content on this screen at any time.
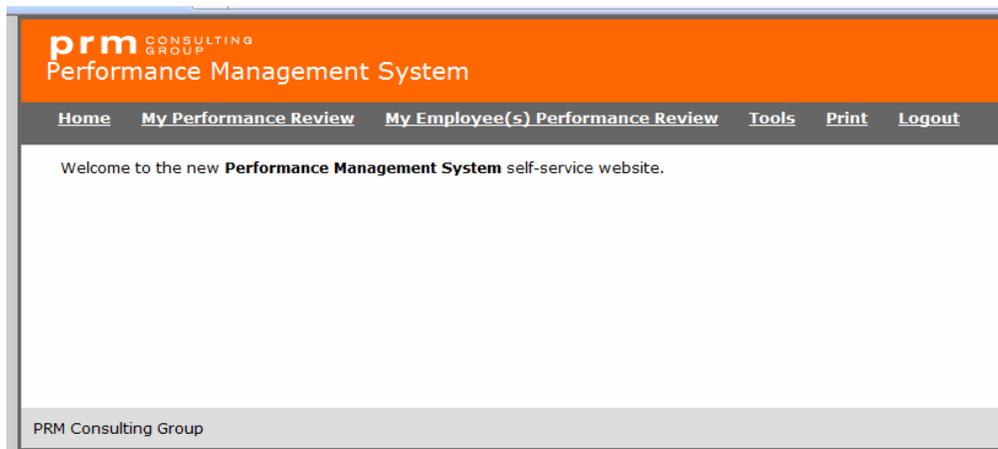

Figure 2

C. My Performance Review Screen

You can access all available forms on this screen, which are assigned by the System Administrator, based on the employee's role within the organization. For purposes of the demo website, the following categories are used: Management Staff, Individual Contributor and Administrative/Support Staff. Figure 3 lists the forms that are assigned to an Individual Contributor.

At the beginning of each performance cycle, users can access a blank review form by clicking the appropriate form under the "Available Forms" section.
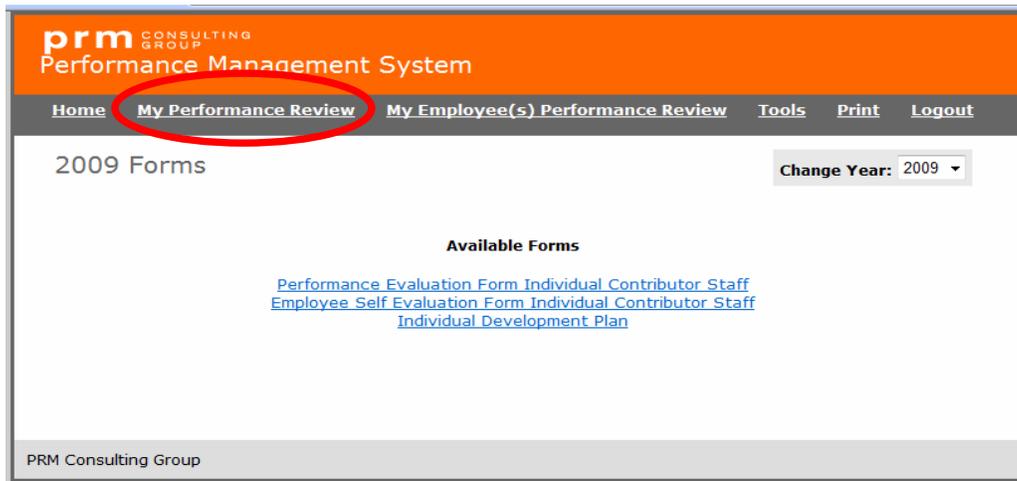

Figure 3

D. My Employee(s) Performance Review Screen

Employees who have subordinates can access their subordinate's evaluation information by clicking the "My Employee(s) Performance Review" tab (see Figure 4). Supervisors also have the ability to view the evaluations of their employees down to the most junior position level. Specifically, a supervisor can "drill down" through his/her chain of command.

The Next Level Supervisor section lists the performance evaluations of employees who receive the highest possible overall performance rating. This function enables the next level of management to review and approve an evaluation, prior to it being shared with the employee.

Figure 4

E. Change Evaluation Year

To view evaluations for other years, you should click the down arrow located in the "Change Year" dropdown box (see Figure 5).

The system will display a confirmation stating that the evaluation year has been changed to the selected year. Click the "Back" link to view forms for the selected year (see Figure 6).
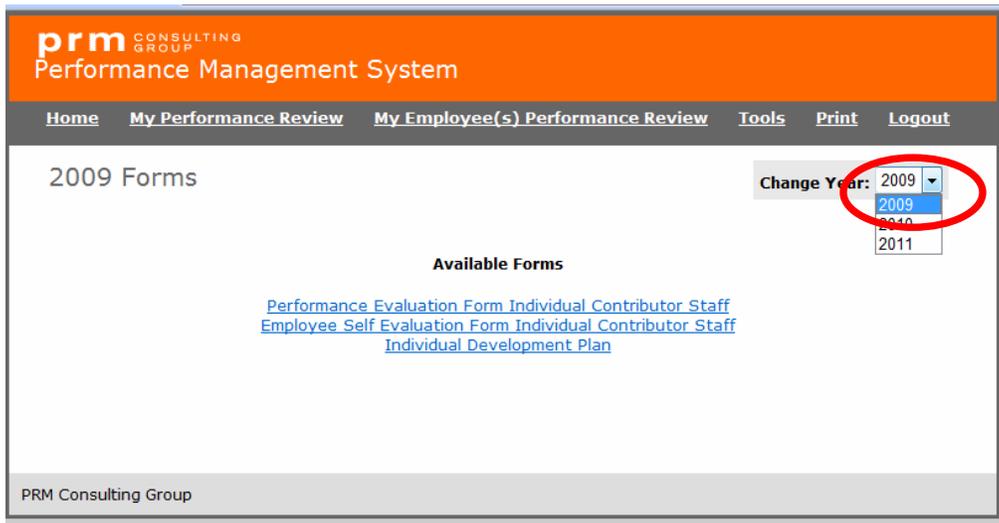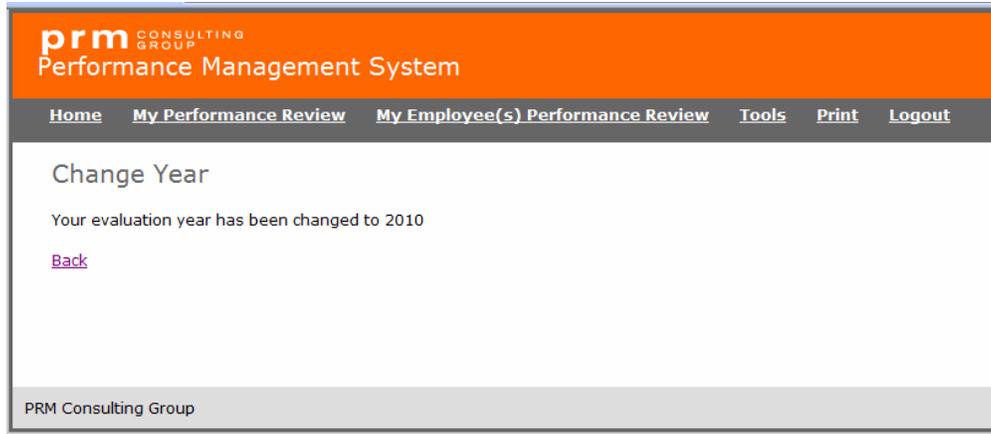

Figure 5

Figure 6

F. System Timeout

Each user session is set to timeout automatically after 60 minutes of inactivity. After 58 minutes you will be alerted that the session will end in 2 minutes (see Figure 7). Once this occurs, you will have two options:

- Click "Ok" and refresh the session or,
- Click "Cancel" to logout immediately.

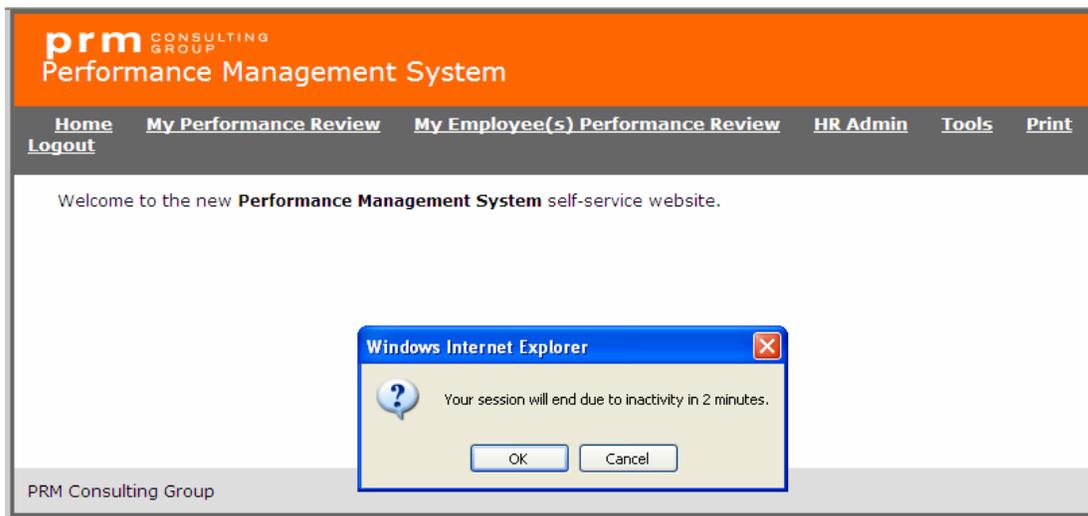**NOTE:** Please be sure to modify your web browser's pop-up blocker settings, to allow the pop-up alert window to appear from the web application URL: http://prm-solutions.com/prmpms/

Figure 7

G. Tools

This tab is used to access customized user guides developed by PRM.

H. HR Admin

Information within this tab enables the internal System Administrator to complete the following tasks:

- Assign a new/different manager to an employee's record.

- View all employee performance reviews.

- Update organizational relationships.

- Add or delete employees.

- Edit employee records.

- Grant administrator rights to other users.

- Create new forms based on the existing template.

- Change the overall weighting assigned to objectives and competencies.

- Edit form text.

- Change form names and evaluation year.

- Update the home page message.

- Edit objectives.

- Assign employees to a different form.

- Redeploy closed performance evaluations.

I. Print Friendly Version

This option should be used to print any available forms. The forms will automatically format appropriately once you click the print icon.

II. Using the Performance Management Website

Using the Performance Management Website

A. Accessing the Self-Service Website

To access the performance management self-service website, visit http://prm-solutions.com/prmpms/. Your login credentials will be provided by a PRM Consulting Group (PRM) representative.

Figure 1

B. Accessing Performance Information (*Employee View*):

You can input performance objectives by clicking the "My Performance Review" tab and selecting the Performance Evaluation form (see Figures 2 and 3). You can also use this form to:

- Review the competencies;

- Complete the Individual Development Plan;

- Complete the annual self-evaluation relative to goals and objectives as well as competencies; and

- View the annual performance review once it has been completed by the applicable supervisor.
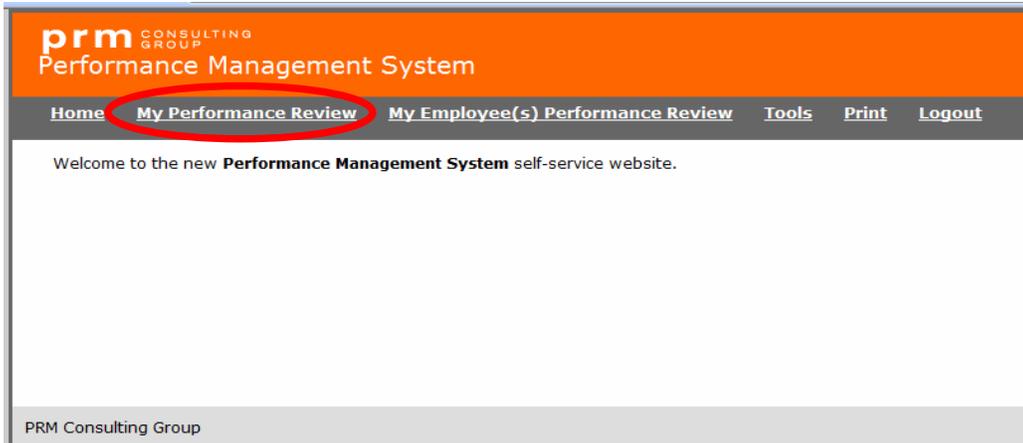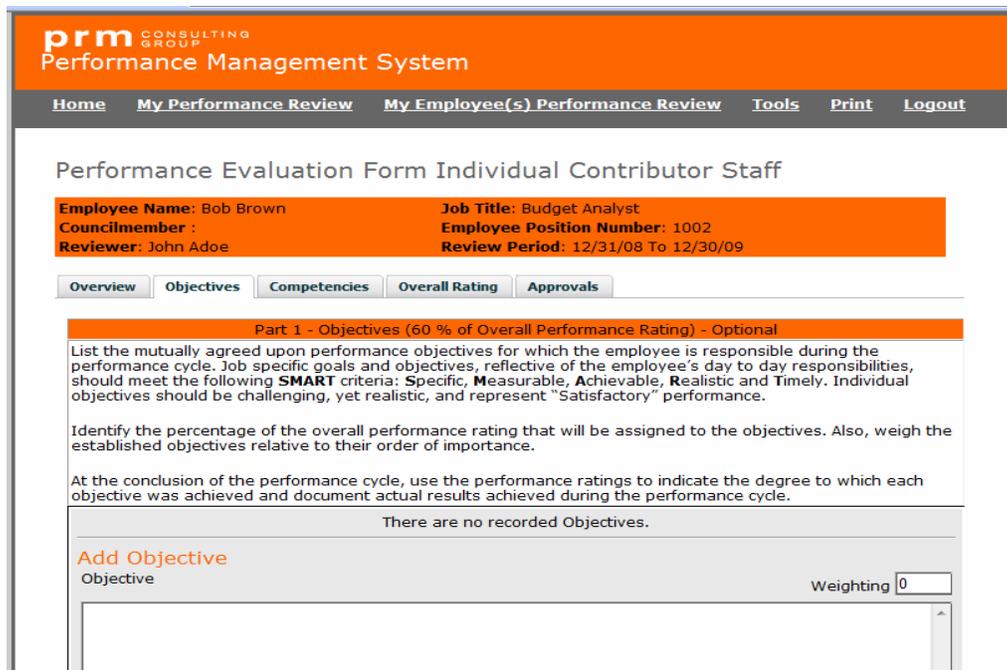
Figure 2

Figure 3

C. Accessing Performance Information (*Supervisor View*)

Supervisors can input an employee's performance objectives and enter the relative weights (e.g., 50%, 30%) for the objectives by clicking the "My Employee(s) Performance Review" tab (see Figure 3). This is the tab that is clicked to complete the employee's mid-year review, individual development plan, annual performance review, as well as performance improvement plan (if needed).
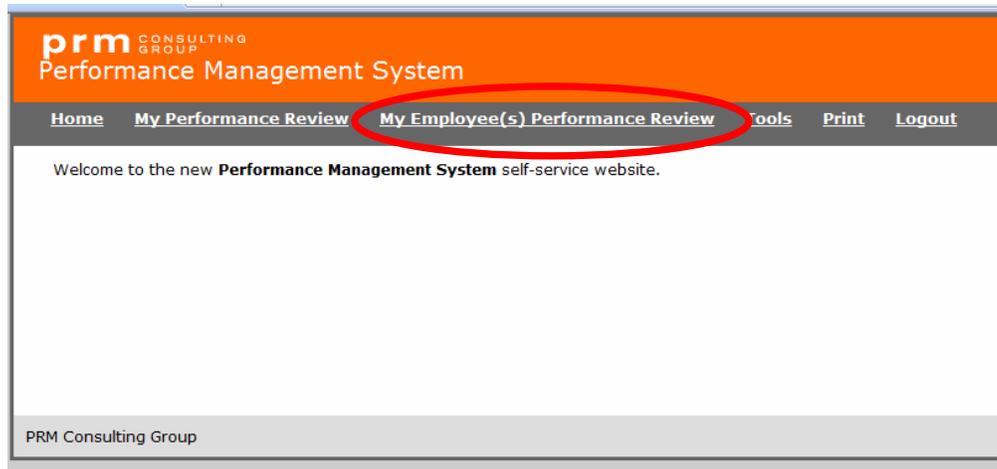
Figure 4

NOTE: Employees have the ability to enter their own performance objectives and the relative weighting for each.

D. Completing an Individual Development Plan

You can access the Individual Development form by clicking the "My Employee(s) Performance Review" tab (see *Accessing Performance Information*) and selecting an employee.

Next, click the Individual Development Plan form and document the employee's developmental areas, the corresponding action plan, and date (see Figure 5). Then, click the "Supervisor's Signature" button. This will serve as the official approval of the individual development plan.

NOTE: The "Employee's Signature" button is clicked by employees to acknowledge they have received and reviewed the development plan.
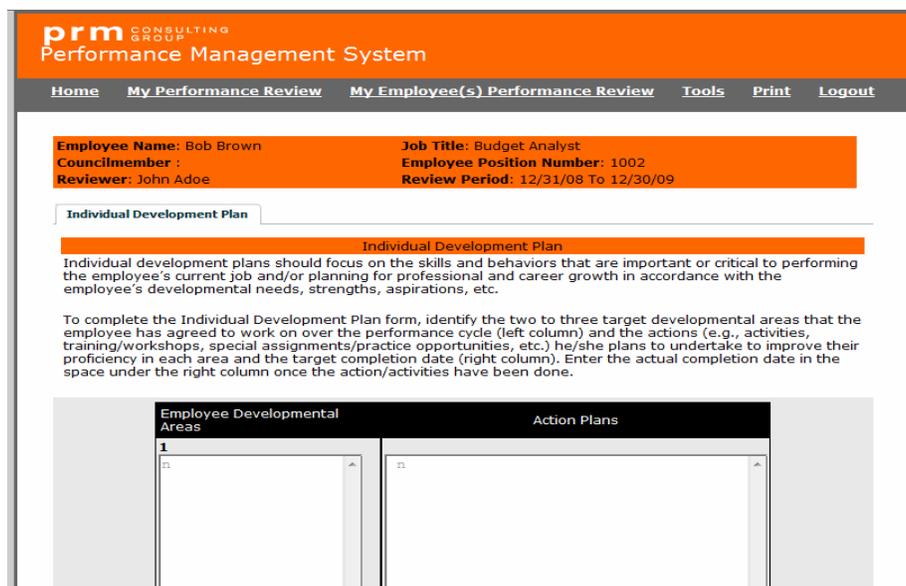
Figure 5

E. Inputting Mid-Year Review Feedback

You can access the Mid-Year Review form by clicking the "My Employees Performance Review" tab (see *Accessing Performance Information*) and selecting an employee.

Next, click the Mid-Year Review form and document the employee's progress to-date (see Figure 6). Then, click the "Approvals" tab and press the "Supervisor's Signature" button. This will serve as the official approval of the mid-year review.

NOTE: The "Employee's Signature" button is be clicked by employees to acknowledge they have received and reviewed the mid-year review.

Figure 6

F. Completing the Year-End Self Evaluation

Completing a year-end self evaluation is a five step process, as follows:

Step 1

Click the "My Performance Review" tab (see *Accessing Performance Information*) and select the Self Evaluation form.

Using the Performance Management Website

Click the "Objectives" button and input the actual results achieved during the performance cycle, relative to each objective. Next, input the performance rating (e.g., 5 – Outstanding, 4 – Excellent, 3 – Satisfactory, 2 – Needs Improvement, 1 – Unsatisfactory) that is reflective of the level of performance.

Figure 7

NOTE: The overall rating for the section will be calculated automatically.

Using the Performance Management Website

Click the "Competencies" button and input comments relative the level of proficiency for each competency. Next, input the appropriate performance rating (e.g., 5 – Outstanding, 4 – Excellent, 3 – Satisfactory, 2 – Needs Improvement, 1 – Unsatisfactory).

Figure 8

NOTE: The overall rating for the section will be calculated automatically.

Using the Performance Management Website

Step 4

Click the "Overall Rating" button and review the overall performance rating as well as enter any overall comments in the "Employee Comments" section.

Figure 9

Step 5

Click the "Employee's Signature" button to release the review to the supervisor. The self evaluation will not be visible to the supervisor until the Employee's Signature button is selected.

Figure 10

G. Conducting a Year-End Review

Completing a year-end review is a five step process. Upon the completion of a self-evaluation by the employee, supervisors complete the following steps:

Step 1

Access the employee's record by clicking the "My Employees Performance Review" tab (see *Accessing Performance Information*) and selecting an employee.

Step 2

Click the "Objectives" button and input the actual results achieved by the employee during the performance cycle, relative to each objective. Next, input the performance rating (e.g., 5 – Outstanding, 4 – Excellent, 3 – Satisfactory, 2 – Needs Improvement, 1 – Unsatisfactory) that is reflective of the employee's level of performance (see Figure 11).

Figure 11

NOTE: The overall rating for the section will be calculated automatically.

Using the Performance Management Website

Step 3

Click the "Competencies" button and input comments relative to the level of proficiency for each competency. Next, input the appropriate performance rating (e.g., 5 – Outstanding, 4 – Excellent, 3 – Satisfactory, 2 – Needs Improvement, 1 – Unsatisfactory).

Figure 12

NOTE: The overall rating for the section will be calculated automatically.

Using the Performance Management Website

Click the "Overall Rating" button and review the overall performance rating as well as enter any overall comments in the "Reviewer's Comments" section. If the employee receives an overall performance rating of Needs Improvement or lower, supervisors are encouraged to complete a performance improvement plan for the employee by clicking the "Performance Improvement Plan" form under "Available Forms" (*See Completing a Performance Improvement Plan*).

Figure 13

If the employee receives an overall performance rating of Outstanding, the Next Level Supervisor should be contacted to have the evaluation reviewed and approved, prior to sharing the results with the employee. NOTE: The review will not be displayed to the employee until the Next Level Supervisor has selected the "Next Level Supervisor" button under the approvals tab (see Figure 14).

Figure 14

Using the Performance Management Website

Click the "Supervisor's Signature" button to release the review to the employee. This will serves as the official approval of the review.

Figure 15

H.   Completing a Performance Improvement Plan

You can access the Performance Improvement Plan form by clicking the "My Employees Performance Review" tab (see *Accessing Performance Information*) and selecting an employee.

Next, click the Performance Improvement Plan form and document the employee's performance improvement areas, the corresponding action plan, progress comments and date (see Figure 16). Then, click the "Supervisor's Signature" button. This will serve as the official approval of the employee's performance improvement plan.

NOTE: The "Employee's Signature" button is clicked by employees to acknowledge they have received and reviewed the performance improvement plan.

Using the Performance Management Website

Figure 16

III. PRM Consulting Group Performance Management Capabilities

PRM Consulting Group Performance Management Capabilities
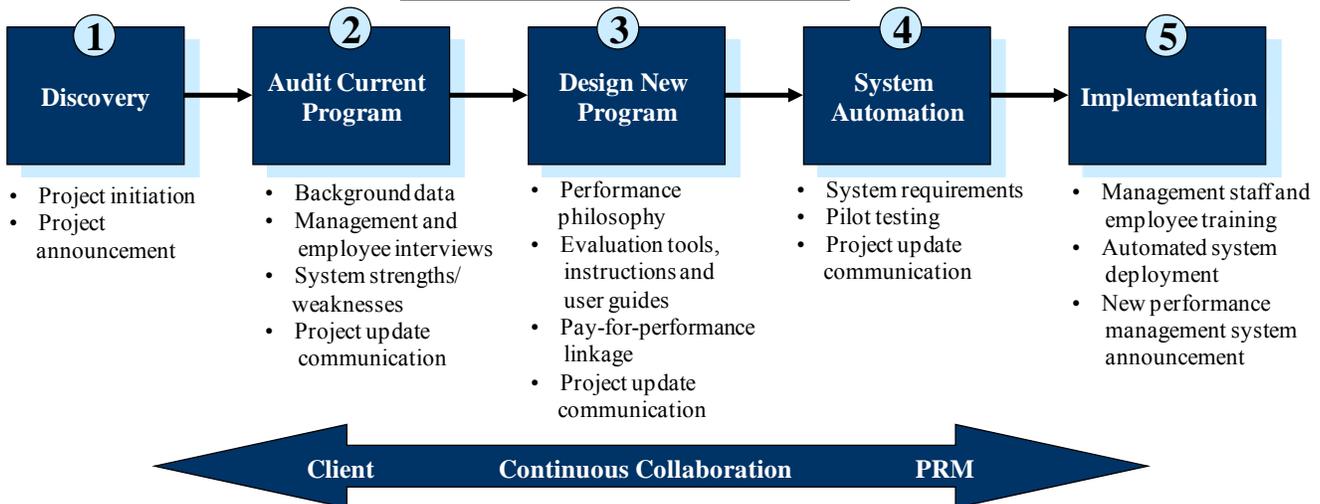
Why Focus on Performance Management?

A comprehensive **Performance Management System:**

- Aligns an organization's key strategic business priorities with its day-to-day operations and desired employee behaviors.
- Identifies the performance metrics/success factors that drive organizational success.
- Serves as a platform for attracting, developing, retaining and rewarding the right employees.
- Facilitates improved talent management through the identification of organizational synergies.

PRM Can Assist You with Implementing the Following Key System Elements:

- Clearly defined organizational strategic goals/priorities.
- Utilization of "Top-down/Bottom-up" approach to business planning.
- Ongoing systematic alignment of employee objectives to organizational strategic goals/priorities.
- Techniques for engaging leadership and management.
- Continuous "two-way" communication

PRM's Unique Approach

① Discovery	**② Audit Current Program**	**③ Design New Program**	**④ System Automation**	**⑤ Implementation**
• Project initiation • Project announcement	• Background data • Management and employee interviews • System strengths/ weaknesses • Project update communication	• Performance philosophy • Evaluation tools, instructions and user guides • Pay-for-performance linkage • Project update communication	• System requirements • Pilot testing • Project update communication	• Management staff and employee training • Automated system deployment • New performance management system announcement

Client ⟷ Continuous Collaboration ⟷ PRM

About PRM CONSULTING GROUP?

PRM is a professional services firm committed to assisting organizations on performance management and other human resource-related issues. Our consultants are nationally recognized experts who are knowledgeable and experienced in consulting with diverse types of organizations. We would welcome the opportunity to partner with you in design/redesigning your **Performance Management System**.

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