



# Collaborative Performance Management System

## LEARNING MANAGEMENT SYSTEM USER GUIDE

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PILOT PHASE | UPDATED OCTOBER 2010



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## GENERAL OVERVIEW

The Learning Management System (LMS) is one of many tools available to support the users of the County's Collaborative Performance Management System (CPMS). It provides an easy to use resource to:

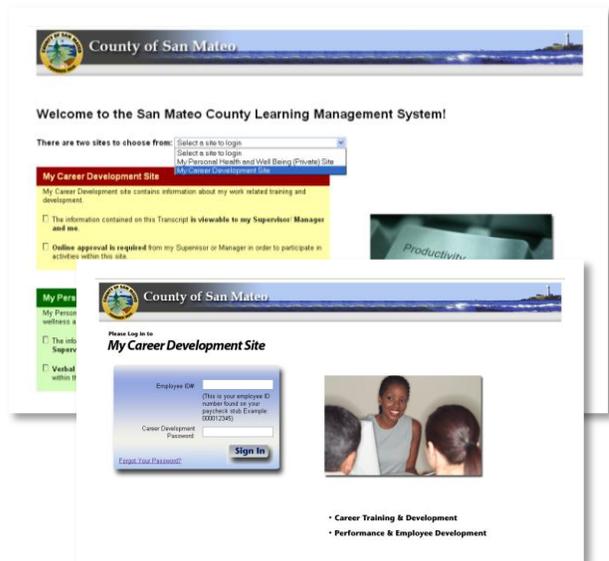
- Notify the employee and supervisor of CPMS deadlines and facilitate communication about roles and responsibilities
- Document the goals and performance factors agreed to during performance planning
- Align individual goals to higher-level goals for the work unit, department, or County
- Create action plans (specific tasks with dates) to support the accomplishment of each goal
- Report and track progress on action plans and results
- Capture performance feedback from coaching discussions between the employee and supervisor to help make interim progress reviews and year-end evaluations more constructive and meaningful
- Develop and finalize the performance evaluation
- Find helpful resources, such as videos and "how-to" guides

It is important to note that LMS is a tool for CPMS, not the process itself. CPMS processes such as performance planning, SMART goal setting, and providing feedback and coaching require collaboration and dialog between the employee and his/her supervisor to establish clear expectations and guide performance. LMS provides a helpful way to support and document this collaboration.

## LOGGING INTO LMS

- 1 Go to [www.co.sanmateo.ca.us/LMS](http://www.co.sanmateo.ca.us/LMS).
- 2 Select the **My Career Development Site**.
- 3 Login using your nine-digit employee ID number (found on your e-advice).

If you don't remember your password, click on the **Forgot Your Password** link to reset it.



If you have login difficulties, contact your department's LMS Administrator.

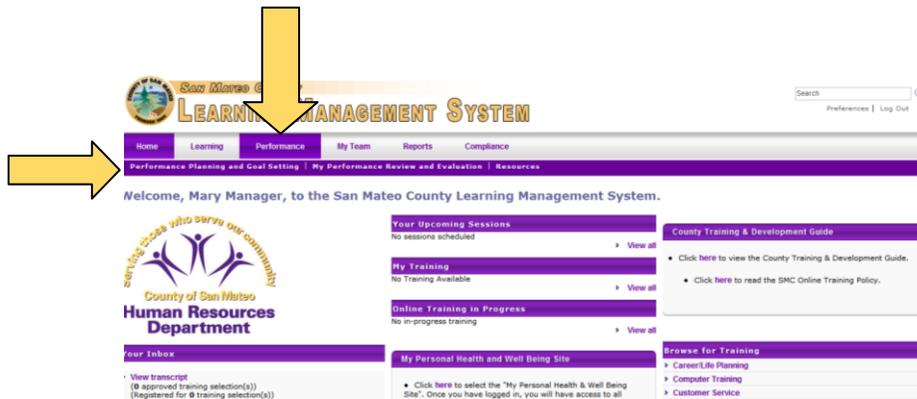
### CPMS PILOT DEPARTMENT LMS ADMINISTRATORS

Department	LMS Administrator	Phone Number
<b>County Manager's Office</b>	Mina Lim	363-4124
<ul style="list-style-type: none"> <li>• Agricultural Weights &amp; Measures</li> <li>• Public Safety Communications</li> </ul>	Ronald Pummer	363-4700
<b>First 5</b>	Maricela Watt	372-9500, x223
<b>Housing</b>	Yvonne Ho	802-3379
<b>Human Resources</b>	Gabe Aponte	363-4847
<b>Human Services Agency</b>	Kathy Merlo	802-7965
<b>Library</b>	Nicole Pasini	312-5274
<b>Parks</b>	Sara Medina	363-4084
<b>Planning &amp; Building</b>	Virginia Diehl	363-1857
<b>Probation</b>	Bridget Love	312-5261
<b>Public Works</b>	Marney Taylor	599-1451

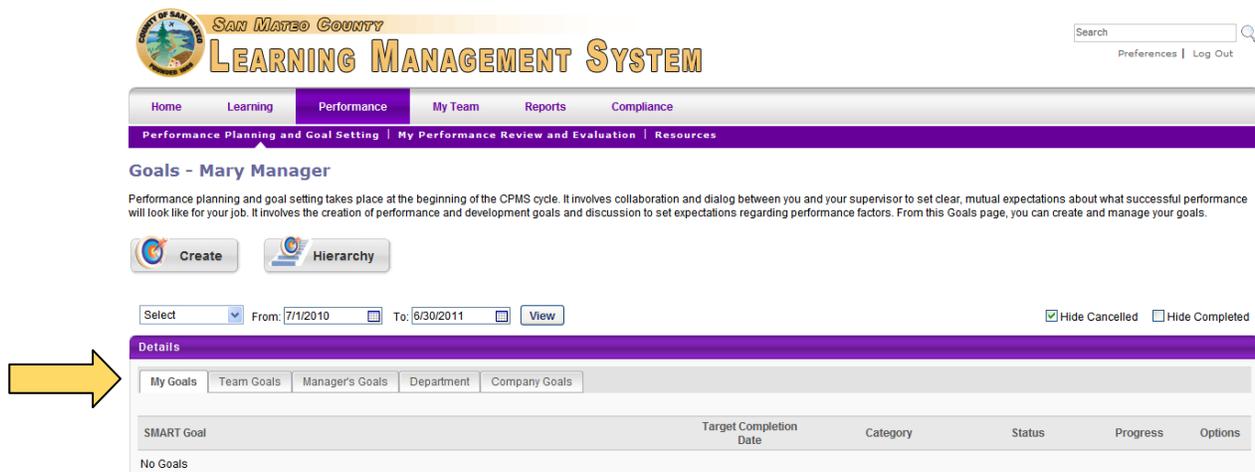
# PERFORMANCE PLANNING & GOAL SETTING

## EXPLORE THE PERFORMANCE PLANNING & GOAL SETTING TAB

To access the **Performance Planning and Goal Setting** page, hover your mouse over the **Performance** tab on the LMS Home page and click on **Performance Planning and Goal Setting**.



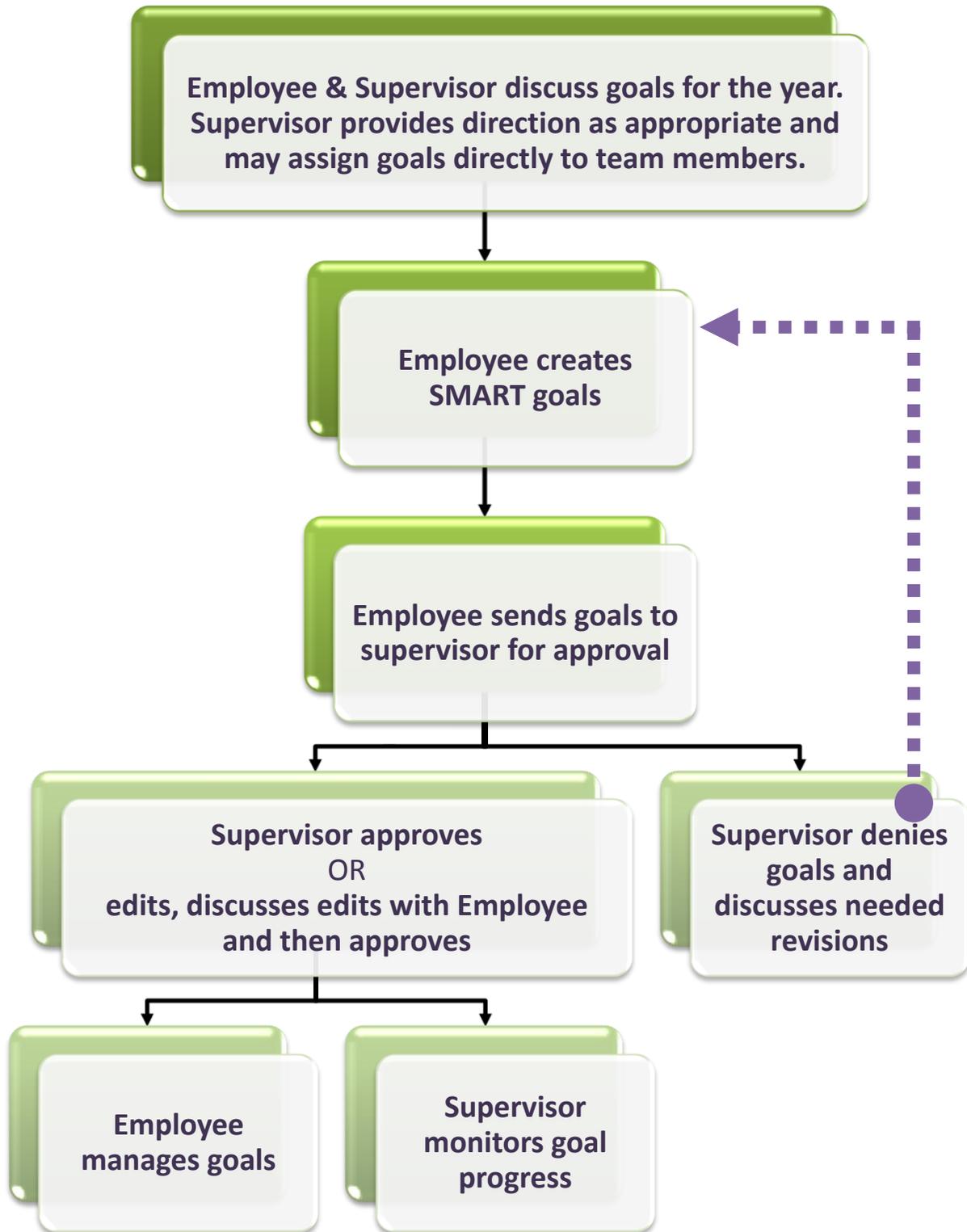
This tab is where you will set and manage your goals. It is also where you can view other goals that are relevant to you.



This page contains **Goal Tabs**, designed to separate goals by category:

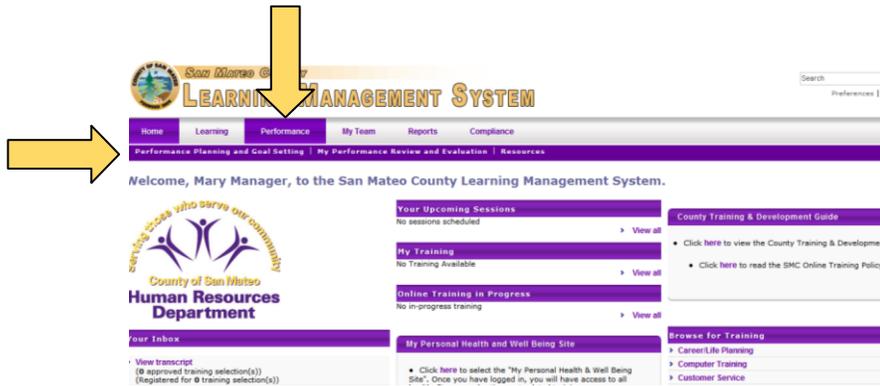
- **My Goals:** This is where your individual goals will display.
- **Team Goals:** This tab is only viewable to supervisors. Goals set by direct reports will display here. If team members haven't yet set up goals, this tab will not display.
- **Manager's Goals:** This tab is where you will see the individual goals your supervisor has set for him or herself.
- **Department Goals:** This tab is where department goals will be displayed.
- **County Goals:** Displays the Shared Vision 2025 Community Outcomes as well as any other countywide goals and priorities.

## GOAL CREATION WORKFLOW

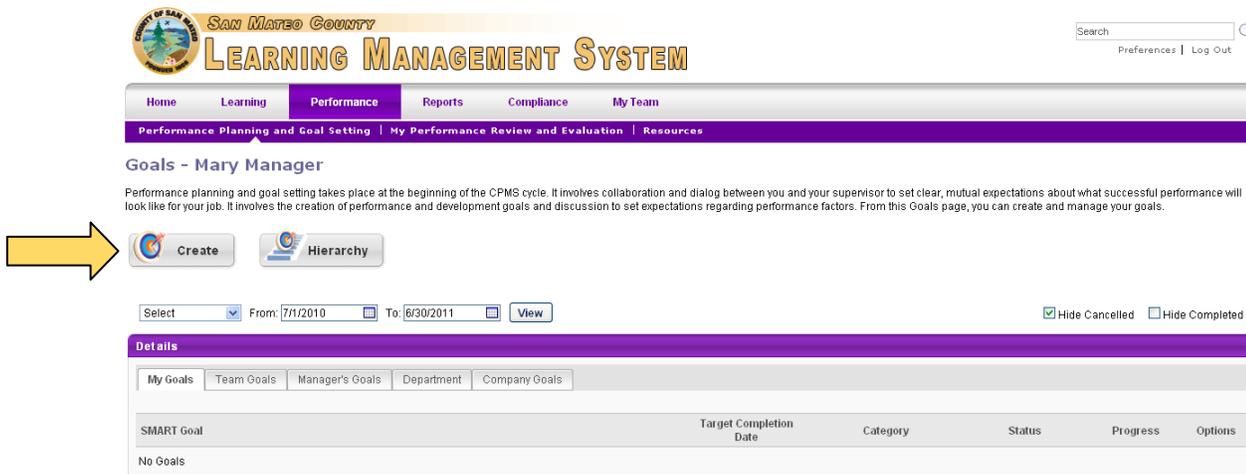


## CREATE A SMART GOAL

Once you've prepared your SMART goal, navigate to the **Performance** tab and click on **Performance Planning and Goal Setting**.



### 1 CLICK ON THE CREATE BUTTON



It does not matter what tab you are under (My Goals, Manager's Goals, etc.) when you click on the **Create** button. There is only *one* goal creation page.

If you are a supervisor, later in the process you will have the option to specify whether the goal you have created is for yourself or whether you are assigning it to one or more members of your team.

## 2 SELECT GOAL ALIGNMENT

### A CREATE AN ALIGNED SMART GOAL

Most individual goals will be aligned to a higher-level goal. If you want to create an aligned goal, select the pre-existing goal you wish to align with on the screen and click on the **Next** button.

#### Create Goals

**Align**

Create and align your individual goals based on discussions with your supervisor regarding the important areas or responsibility and results associated with your job and how they contribute to program, department and County goals. The list below includes the goals for your supervisor, department, and the County as a whole. Please select the one goal to which your individual goal best aligns. Your individual goal will be pre-populated with the details of the goal you are aligning with. This is to be taken as a starting point, but you can and will likely need to edit the details to reflect the scope of the goal that is appropriate to your job. In those rare instances in which an individual goal does not align with a higher-level goal, you can select "Do not align" to create an independent goal. If you are not sure about the alignment, talk to your supervisor.

Align	Title	Owner	Due Date	Category
<input type="radio"/>	Do not align			
<input type="radio"/>	County Vision 2025 Collaborative Community: Our leaders forge partnerships, promote regional solutions, with informed and engaged residents, and approach issues with fiscal accountability and concern for future impacts.	CountyLMS Administrator	12/31/2015	Performance Goals - Related to the Job
<input type="radio"/>	County Vision 2025 Environmentally Conscious Community: Our natural resources are preserved through environmental stewardship, reducing our carbon emissions, and using energy, water and land more efficiently.	CountyLMS Administrator	12/31/2015	Performance Goals - Related to the Job
<input type="radio"/>	County Vision 2025 Healthy Community: Our neighborhoods are safe and provide residents with access to quality health care and seamless services.	CountyLMS Administrator	12/31/2015	Performance Goals - Related to the Job
<input checked="" type="radio"/>	County Vision 2025 Livable Community: Our growth occurs near transit, promotes affordable, livable connected communities.	CountyLMS Administrator	12/31/2015	Performance Goals - Related to the Job
<input type="radio"/>	County Vision 2025 Prosperous Community: Our economic strategy fosters innovation in all sectors, creates jobs, builds community and educational opportunities for all residents.	CountyLMS Administrator	12/31/2015	Performance Goals - Related to the Job
<input type="radio"/>	Doug's test goal aligned with Dana's (Doug's direct supervisor) goal.	Doug Director	3/31/2011	Performance Goals - Related to the Job
<input type="radio"/>	Manage programs, services and budgets such that 75% of quality and outcome measures meet performance targets by the end of the fiscal year.	CountyLMS Administrator	12/31/2015	Performance Goals - Related to the Job
<input type="radio"/>	Provide high quality services on an ongoing basis such that 90% of customer survey respondents rate overall satisfaction with services as good or better.	CountyLMS Administrator	12/31/2015	Performance Goals - Related to the Job

OR...

### B CREATE AN INDEPENDENT SMART GOAL

On rare occasions, an individual goal will be independent of higher-level goals. If you want to create an independent goal, select **Do not align** and click on the **Next** button.

#### Create Goals

**Align**

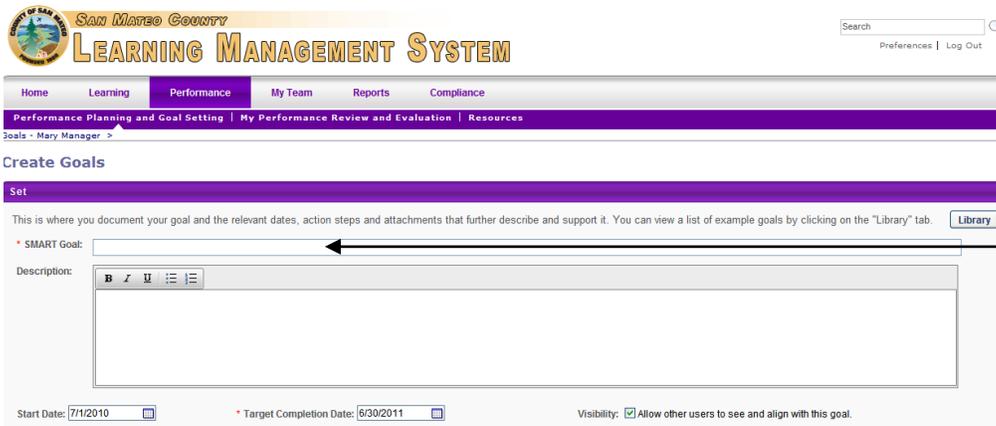
Create and align your individual goals based on discussions with your supervisor regarding the important areas or responsibility and results associated with your job and how they contribute to program, department and County goals. The list below includes the goals for your supervisor, department, and the County as a whole. Please select the one goal to which your individual goal best aligns. Your individual goal will be pre-populated with the details of the goal you are aligning with. This is to be taken as a starting point, but you can and will likely need to edit the details to reflect the scope of the goal that is appropriate to your job. In those rare instances in which an individual goal does not align with a higher-level goal, you can select "Do not align" to create an independent goal. If you are not sure about the alignment, talk to your supervisor.

Align	Title	Owner	Due Date	Category
<input checked="" type="radio"/>	Do not align			
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<input type="radio"/>	County Vision 2025 Environmentally Conscious Community: Our natural resources are preserved through environmental stewardship, reducing our carbon emissions, and using energy, water and land more efficiently.	CountyLMS Administrator	12/31/2015	Performance Goals - Related to the Job
<input type="radio"/>	County Vision 2025 Healthy Community: Our neighborhoods are safe and provide residents with access to quality health care and seamless services.	CountyLMS Administrator	12/31/2015	Performance Goals - Related to the Job
<input type="radio"/>	County Vision 2025 Livable Community: Our growth occurs near transit, promotes affordable, livable connected communities.	CountyLMS Administrator	12/31/2015	Performance Goals - Related to the Job
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<input type="radio"/>	Provide high quality services on an ongoing basis such that 90% of customer survey respondents rate overall satisfaction with services as good or better.	CountyLMS Administrator	12/31/2015	Performance Goals - Related to the Job

On the next screen, you will be able to input your goal.

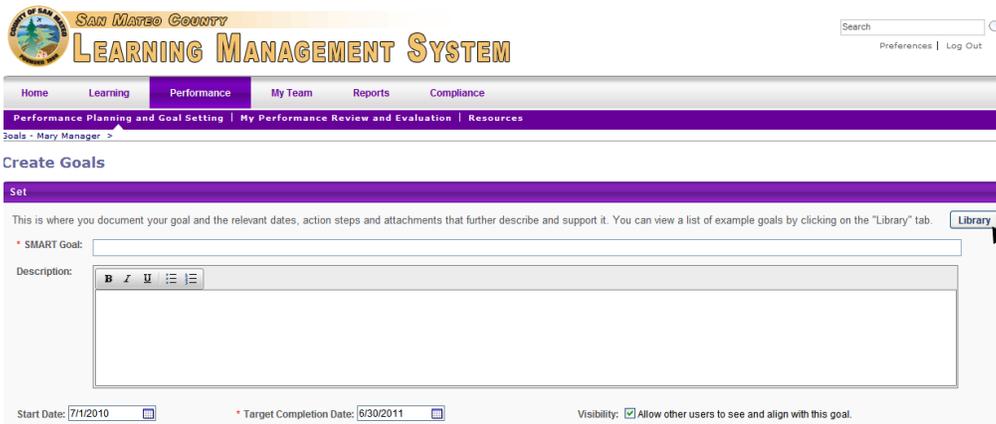
### 3 ENTER YOUR GOAL

If you are creating an aligned goal, the **SMART Goal** field will be pre-populated with the details of the goal you are aligning with. This is to be taken as a starting point. You can and will likely need to edit the goal details to reflect the scope of the goal that is appropriate to your job.



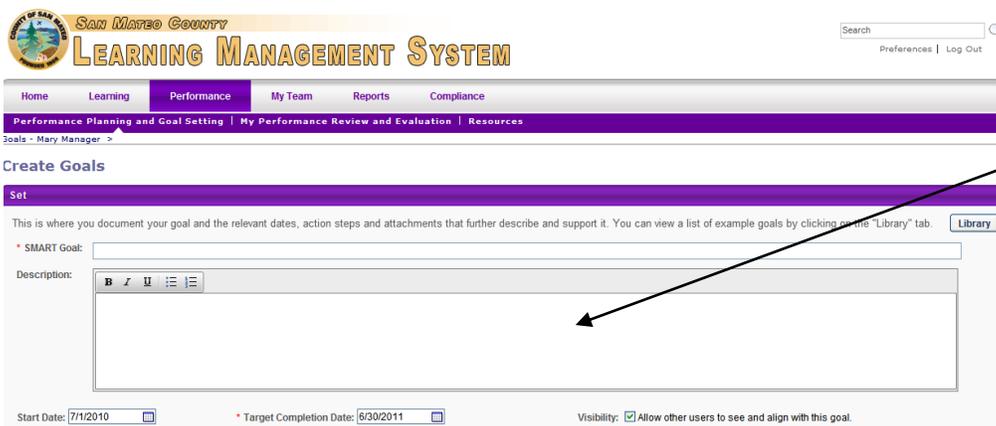
A

Enter your **goal** in this field.



B

**Goals Library:** Click here to view pre-made sample SMART goals.



C

Enter a goal **description**, if appropriate.

You can use this field to note data sources you will use to measure your result or provide other helpful context for your goal.

**D**

Set the **start** and **projected completion date** of your goal.

**E**

**Visibility:** Check this box to make your goal visible to others. This aids information sharing and alignment.  
  
If this is a goal you do not wish to share, do not check this box.

**F**

**Category:** Categorize your goal – is this a development goal, or a performance goal?

San Mateo County  
**LEARNING MANAGEMENT SYSTEM**

Home Learning Performance My Team Reports Compliance

Performance Planning and Goal Setting | My Performance Review and Evaluation | Resources

Goals - Mary Manager >

**Create Goals**

**Set**

This is where you document your goal and the relevant dates, action steps and attachments that further describe and support it. You can view a list of example goals by clicking on the "Library" tab. Library

\* SMART Goal:

Description:

Start Date:  \* Target Completion Date:  Visibility:  Allow other users to see and align with this goal.

\* Category:

Action Items	Start Date	Due Date	Weight	Options
Click on the add icon to add Action Items				

Targets	Target	Start Date	Due Date	Weight	Options
Click on the add icon to add Targets					

**G**

**Action Items:** Add action items that describe the steps you will take to reach your goal by clicking on the plus sign.

You may add as many action items as needed to achieve your goal.

**Add Action Items**

\* Description:

Start Date:  Due Date:  Weight:  %

Save Cancel

Set start/end dates and weights for your action item.

**H**

**Targets:** To add a quantifiable target to measure the progress on your goal, click the plus sign. Targets are optional.

**Add Targets**

\* Description:

Start Date:  Due Date:  \* Type:  Weight:  %

Start Value:  \* Target:

Save Cancel

**Target Values:** Any quantifiable measure (currency, days, other numbers) you wish to track will go here. Your **Target** is the number you want to reach, and your **Start Value** is where you are as of today.

I

**Weighting:** The weight feature in LMS is intended to allow users to assign a level of importance to an **Action Item** and/or **Target**.

The weighting values must add to 100%, otherwise LMS won't allow you to click to the next screen.

Assigned weight values will impact your overall goal percentage completion rate as you update your goal's progress.

J

**Attachments:** You may attach any project/ action plans or other documents related to your goal by clicking on the plus sign. Accepted file formats are Word, Excel, PowerPoint, Outlook, pdf, .txt, .rtf, .gif and/or .jpg files here.

There is a 1 MB file size limit.

Description	Start Date	Target Completion Date	Progress
Item #1	9/1/2010	9/15/2010	0 %
Action Item #2 here...	9/5/2010	10/5/2010	0 %
Action Item #3 here...	10/5/2010	10/28/2010	0 %

K

You have the option to save your goal as a draft and continue working on it later.

L

If you are a supervisor, click **Next** to proceed.

If you do not have any direct reports, click **Submit**.

**IF YOU DO NOT SUPERVISE ANY EMPLOYEES, SKIP TO STEP 5.**

#### 4 ASSIGN A SMART GOAL (FOR SUPERVISORS)

If you are a supervisor, you will have the option to create this goal for yourself or to assign it to one or more members of your team.

##### A ASSIGN AN INDIVIDUAL GOAL

If this is an individual goal, check the **Yourself** button and click **Submit**.

*Skip to Step 5.*

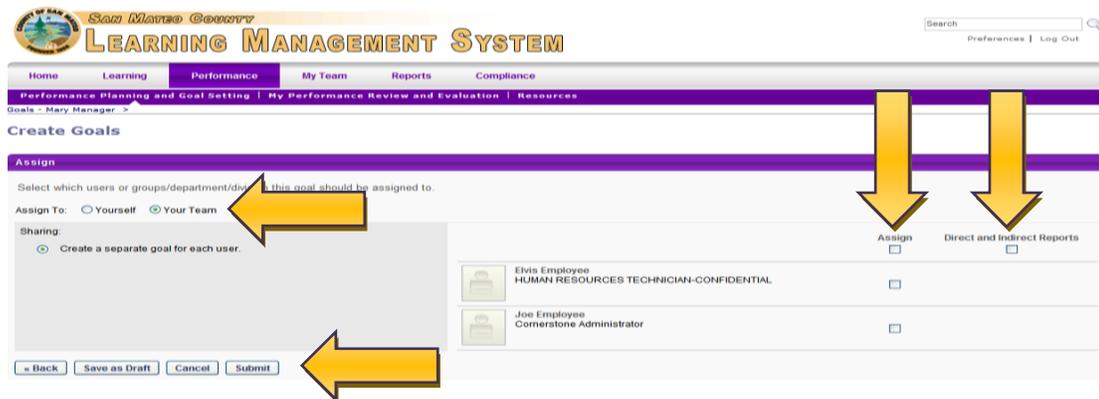


##### B ASSIGN A TEAM GOAL

If you'd like to set this as a goal for your team, click on the **Your Team** button.

You will see all of your direct reports and will have the option to make this goal a *separate* goal for each user (individually assigning it to one or more members of your team).

You can also assign goals to your indirect reports (if any) by clicking on the **Direct and Indirect Reports** checkbox.



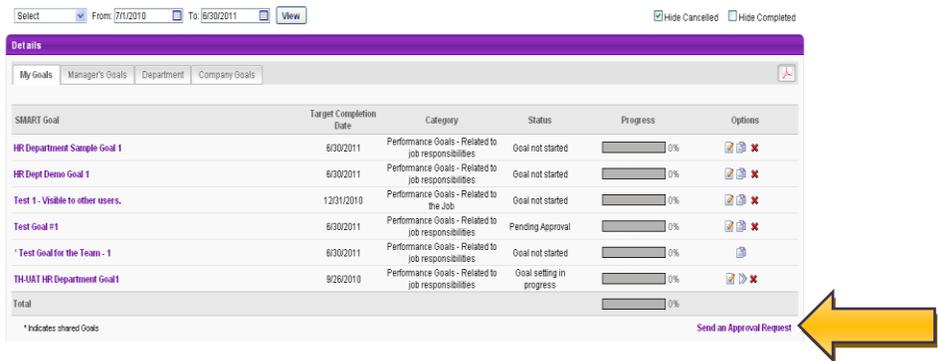
Once you've configured your goal the way you want it, click **Submit**.

**5 SEND A GOAL APPROVAL REQUEST**

**A CLICK ON “SEND AN APPROVAL REQUEST”**

This triggers an email to your supervisor asking him/her to approve your individual goal.

**Note:** This step only applies to individual goals. Goals created and assigned by supervisors do not require approval.

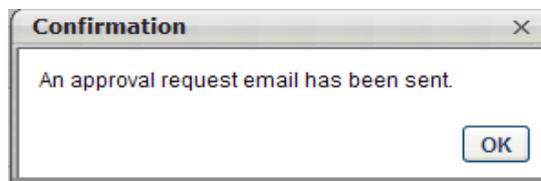


**B CONFIRM THE REQUEST**

You will be asked to confirm whether you want to submit your goal(s) for approval. If you are sure, click **Yes**.



If you click **Yes**, you will receive a confirmation.



Your goal will now show up in the **My Goals** tab with the status of **Pending Approval**. Your supervisor has the option to approve, deny, or modify your goal. You will receive an email notification once your supervisor takes action on your goal approval request.

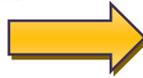
**IF YOU DO NOT SUPERVISE ANY EMPLOYEES, SKIP TO “MANAGE YOUR GOALS” ON PAGE 23**

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## APPROVE OR DENY A DIRECT REPORT'S GOAL (FOR SUPERVISORS)

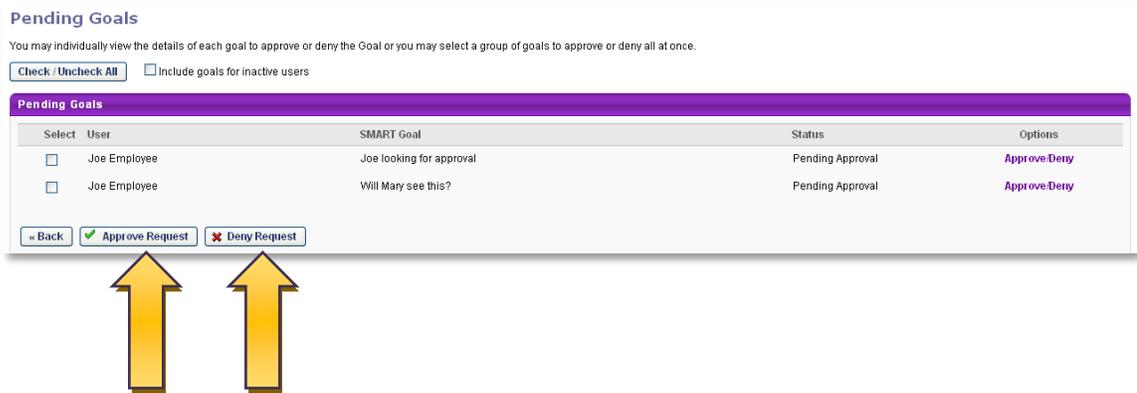
You will receive an email notification whenever you have a goal to approve.

To approve a goal, log into LMS, and on your home page, click on the **Approve Goals** link in **Your Inbox**.



### 1 APPROVE OR DENY REQUEST WITHOUT REVIEW

On this screen, click on the boxes next to the goals you'd like to take action on and click on **Approve Request** or **Deny Request**. This option provides a quick way to act on goals you have previously reviewed and/or discussed with your direct reports.



Whatever action you take (approve or deny), an email notification is sent to the employee who submitted the goal.

**OR...**

**2 REVIEW AND/OR REVISE GOALS BEFORE APPROVAL/DENIAL**

If you wish to see the goal in greater detail prior to approving or denying it, or if you'd like to make modifications to a submitted goal:

**A**

Under the **Options** column, click **Approve/Deny**.

**B**

Click on the **Edit** icon next to **General Goal Information** in the upper left-hand corner of the page.

*If you do not need to edit anything, skip to step D.*

**C**

Select and edit the goal details as necessary. All fields of the goal – **Action Items, Targets, Dates, Goal, Goal Description** – are editable by the supervisor.

**IMPORTANT!** Supervisors should discuss the modifications to the goal with the employee to ensure clear, mutual understanding of expectations. Both the employee and supervisor will be able to see a history of the actions taken related to the goal, including when and by whom the goal was changed.

The screenshot shows a goal management interface with several sections: 'Action Items', 'Targets', 'Attachments', 'Goal Alignment', 'Comments', and 'History'. At the bottom left, there are three buttons: 'Approve', 'Deny', and 'Cancel'. A yellow arrow points to the 'Deny' button.



Click on **Approve** or **Deny**.

An email notification is sent to the employee who submitted the goal.

If you select **Deny**, LMS will prompt you for comments, which will be included in the notification to the employee. Here you may enter the reasons why you denied the goal.

The 'Deny Request' dialog box has a title bar with 'Deny Request' and a close button. It contains a 'Comments:' label, a text area with the text 'This is only a test denial...', and two buttons at the bottom: 'Deny Request' and 'Cancel'.

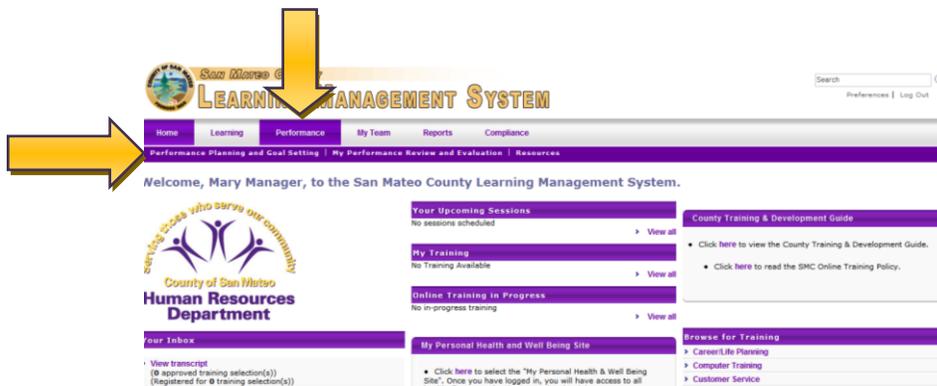
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## MANAGE YOUR GOALS

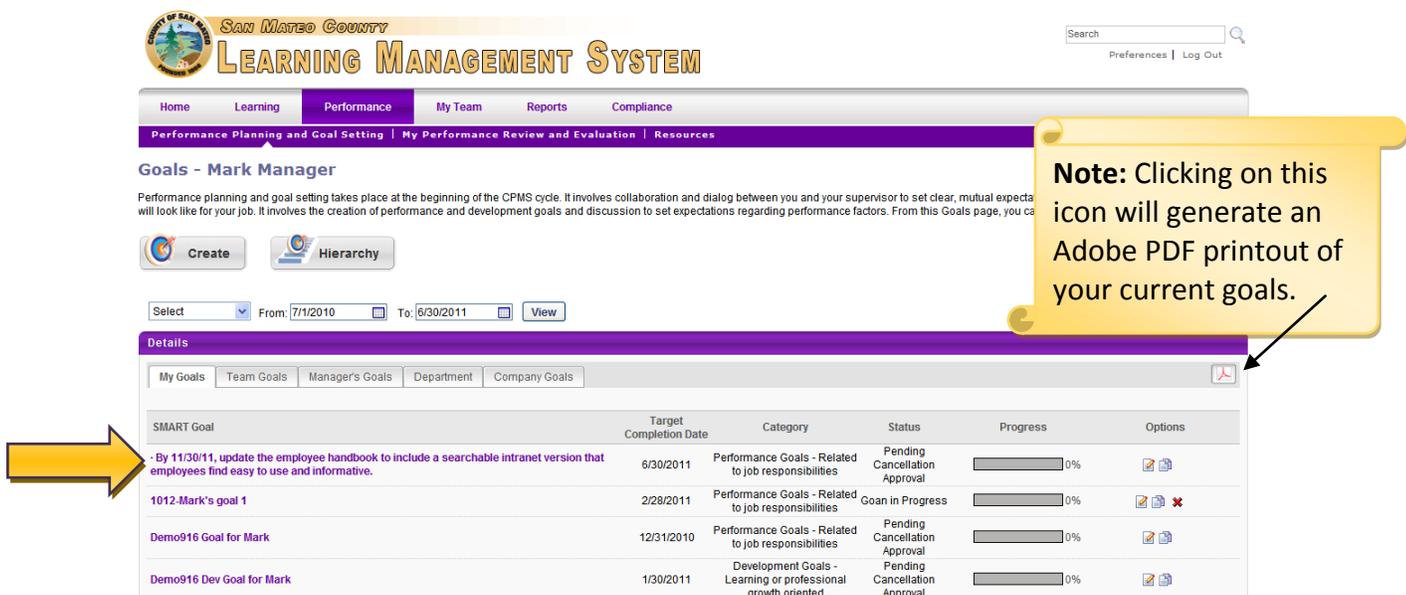
The LMS Performance Management Module makes it very easy for you to manage your goals. Using LMS, you can view your goals, monitor and update the status of **Action Items** and/or **Targets**, post comments, upload documents, and make revisions.

### 1 UPDATE GOAL PROGRESS

When you wish to update your goal progress by changing the status of Action Items and/or Targets, navigate to the **Performance** tab and click on **Performance Planning and Goal Setting**.



### A CLICK ON THE GOAL YOU WISH TO EDIT



This will take you to the **Manage Goals** page.

**B EXPLORE MANAGE GOAL PAGE**

On this page you will have the option to update your progress on **Action Items** and adjust **Targets**, if any.

**Arrows:** These up/down arrows expand and collapse sections of the **Manage Goals** page.

The screenshot shows the 'Manage Goals' interface. It includes a 'Details' header and several expandable sections: 'GENERAL GOAL INFORMATION', 'Goal Alignment', 'Action Items', 'Targets', 'Attachments', and 'Comments'. Each section has a small upward-pointing arrow on its right side to expand it. The 'Action Items' section contains a table with columns for Description, Start Date, Target Completion Date, and Progress. The 'Targets' section contains a table with columns for Description, Start Date, Target Completion Date, Target, and Actual.

**C UPDATE ACTION ITEM PROGRESS**

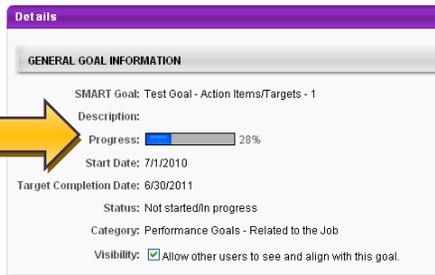
To update the progress on any of your **Action Items**, simply key in the updated percentage completion on any of the individual items.

Description	Start Date	Target Completion Date	Progress
Action Item #1	9/1/2010	11/30/2010	<input type="text" value="0"/> %
Action Item #2	10/1/2010	3/31/2011	<input type="text" value="0"/> %
Action Item #3	1/1/2011	6/30/2011	<input type="text" value="0"/> %

### D UPDATE TARGET PROGRESS

To update the progress on any of your **Targets**, simply key in the updated actual value on any of the individual items.

Description	Start Date	Target Completion Date	Target	Actual
Target #1	10/1/2010	12/31/2010	100.00	<input type="text" value="0"/>
Target #2	11/1/2010	6/30/2011	250.00	<input type="text" value="0"/>

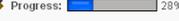


**Details**

**GENERAL GOAL INFORMATION**

SMART Goal: Test Goal - Action Items/Targets - 1

Description:

Progress:  28%

Start Date: 7/1/2010

Target Completion Date: 6/30/2011

Status: Not started/in progress

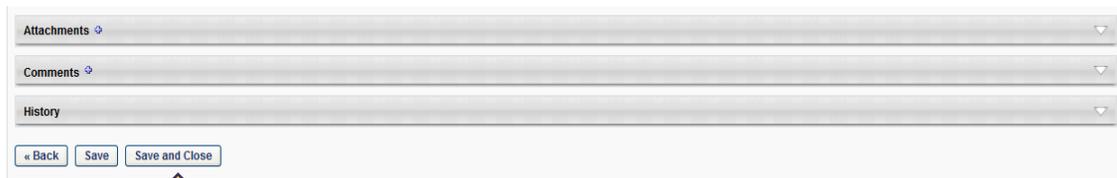
Category: Performance Goals - Related to the Job

Visibility:  Allow other users to see and align with this goal.

**Note:** Updating the **Progress** in either your **Action Items** or **Targets** will change your overall goal progress percentage, depending on the weights you have assigned to each item.

### E CLICK SAVE AND CLOSE

Clicking **Save and Close** will save all your changes and close this screen.



Attachments ▾

Comments ▾

History ▾



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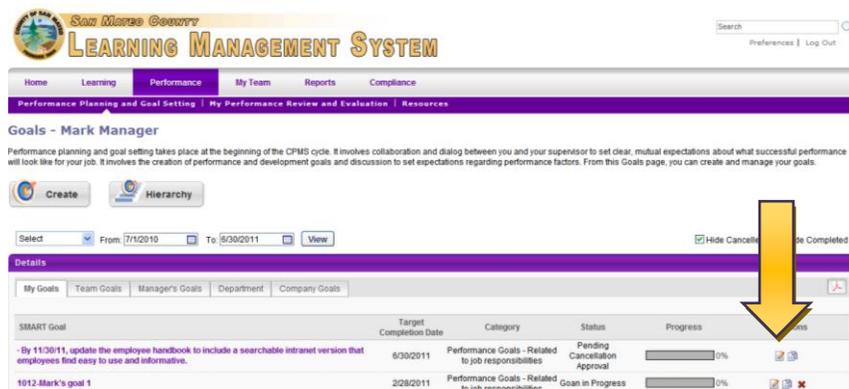
## 2 EDIT A SMART GOAL

If you wish to edit the content of an existing goal, navigate to the **Performance** tab and click on **Performance Planning and Goal Setting**.

### A CLICK EDIT

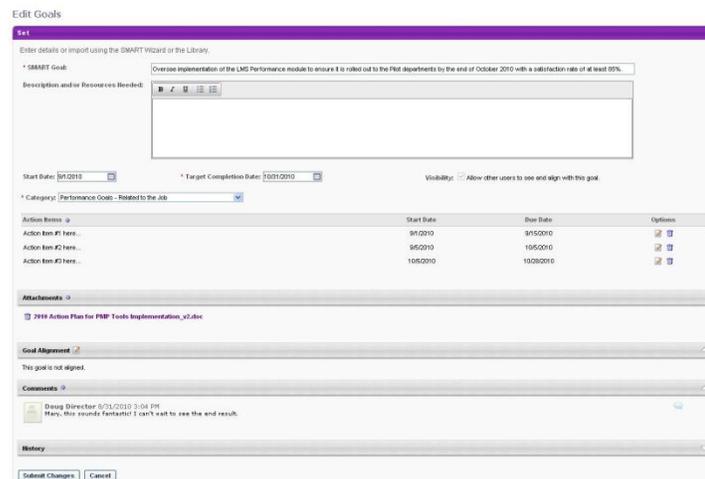
Under the **Options** column, click on the **Edit** icon, on the right-hand side of the goal you wish to edit.

**Note:** Editing a goal will require that your goal be re-approved by your supervisor. Once you click on **Submit Changes**, the goal status will change to **Pending Modification Approval**.



### B MAKE YOUR CHANGES

On this page you can change the goal statement; change time frames; edit, add, or delete action items and/or targets; add comments; and post attachments.



**C CLICK SUBMIT CHANGES**

Clicking **Submit Changes** completes the goal editing process.

Action Item #3	7/1/2010	6/30/2011	20	%	 
Targets					
Target	Start Date	Due Date	Weight		Options
Target #1	1.00 USD	7/1/2010	6/30/2011	20	%  
Target #2	1.00 USD	7/1/2010	6/30/2011	20	%  
Total Weight:			100%		
Attachments					
Goal Alignment					
This goal is not aligned.					
Comments					
History					
<input type="button" value="Submit Changes"/>		<input type="button" value="Cancel"/>			



### 3 ADD COMMENTS

In order to enhance team communication, LMS allows users to interact on the **Goal** page.

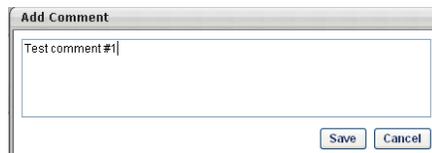
**A TO ADD A COMMENT, CLICK ON THE PLUS ICON NEXT TO “COMMENTS”**



The screenshot shows a goal page with several sections: 'Action Item #3', 'Targets', 'Attachments', 'Goal Alignment', 'Comments', and 'History'. A yellow arrow points to the 'Comments' section, which has a plus icon next to it. Below the sections are 'Submit Changes' and 'Cancel' buttons.

Target	Start Date	Due Date	Weight	Options
Target #1	7/1/2010	6/30/2011	20 %	[Edit] [Delete]
Target #2	7/1/2010	6/30/2011	20 %	[Edit] [Delete]

**B ENTER YOUR COMMENTS IN THE POP-UP BOX. CLICK “SAVE” WHEN COMPLETE**



The 'Add Comment' pop-up box contains a text input field with the text 'Test comment #1' and 'Save' and 'Cancel' buttons.

**C ONCE YOUR COMMENT HAS BEEN MADE, YOU CAN EDIT/DELETE YOUR COMMENT BY USING THE ICONS ON THE RIGHT-HAND SIDE OF THE “COMMENTS” SECTION**



The 'Comments' section shows a comment by 'Ed Employee' dated '9/15/2010 4:30 PM' with the text 'Test comment #1'. To the right of the comment are edit and delete icons, which are highlighted by a yellow arrow.

The interface works much like a threaded discussion forum, since both the supervisor and employee can post comments to this area. All comments are time-stamped.

#### 4 ADD ATTACHMENTS

You can use LMS to store documents related to your goals on the **Goal** page.

**A TO ADD AN ATTACHMENT, CLICK ON THE PLUS ICON NEXT TO “ATTACHMENTS”**



Target	Start Date	Due Date	Weight	Options
Target #1	7/1/2010	6/30/2011	20 %	
Target #2	7/1/2010	6/30/2011	20 %	

Total Weight: 100%

**Attachments**

**Goal Alignment**

This goal is not aligned.

**Comments**

**History**

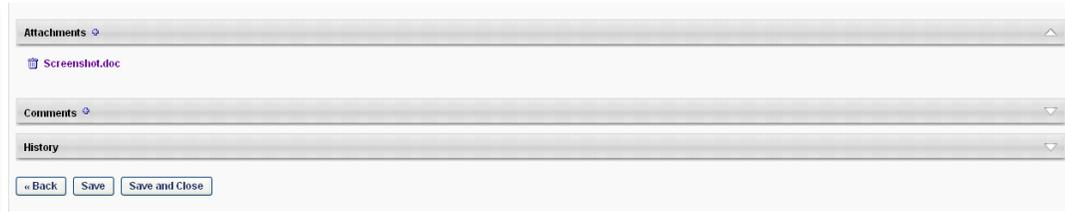
**B CLICK “BROWSE”**

Click **Browse** to find the file you wish to upload on your system.

Once you've found it, click **Upload**.

**C SUCCESS!**

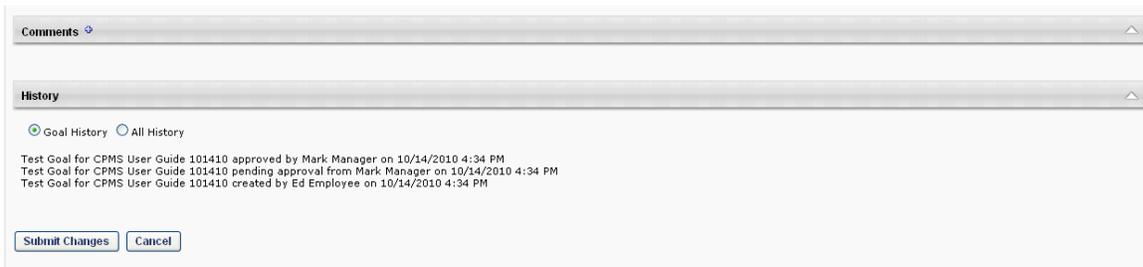
Your file will now appear under the **Attachments** section.



**5 VIEW HISTORY**

LMS stores a history trail of all activity performed on a goal, including modifications, approvals, and denials, with a time stamp and the name of the person taking the action.

To view this information, simply click on the arrow next to **History**.



# PERFORMANCE FEEDBACK & COACHING (FOR SUPERVISORS)

## MY TEAM AS A TOOL FOR MANAGING PERFORMANCE (FOR SUPERVISORS)

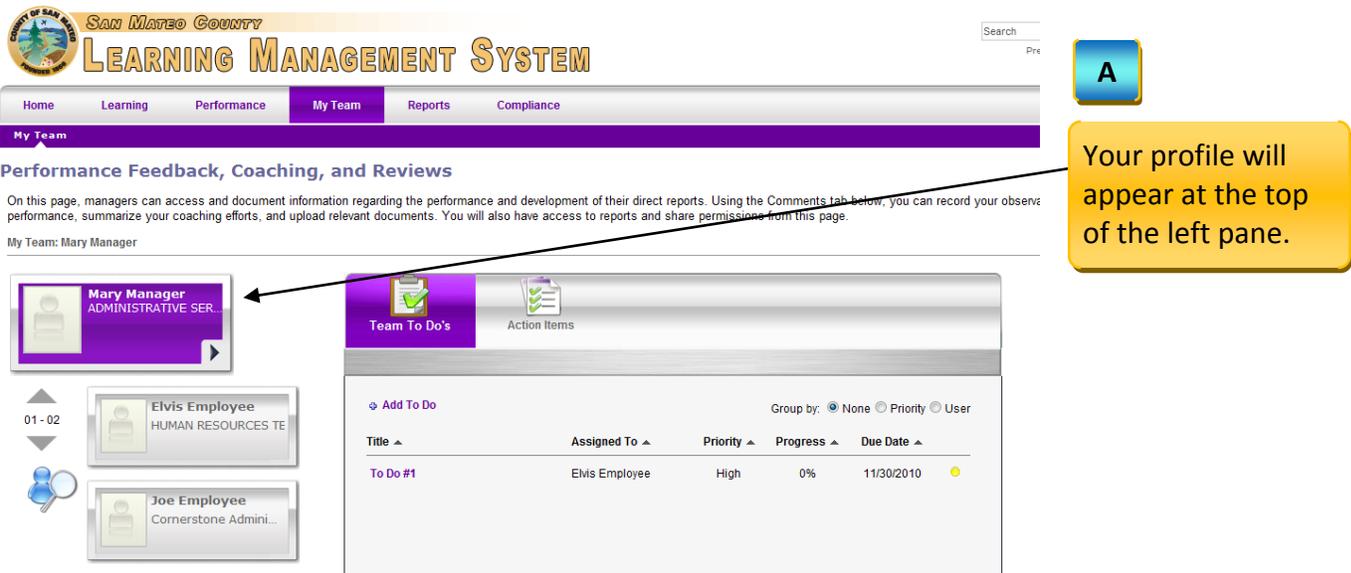
To access the **Performance Feedback and Coaching Module**, go to the **My Team** tab.



The **My Team** tab was already part of LMS, but has been upgraded to better support CPMS. It is a tool for those who supervise others.

Learn how to navigate the **My Team** interface by visiting the different tabs available and exploring their functionality.

### 1 EXPLORE THE ACTIONS WITHIN YOUR PROFILE



# Performance Feedback & Coaching (For Supervisors)

**B**

Hover your mouse over this arrow to view shortcuts for running reports, sharing LMS managerial permissions, assigning training, or creating goals.

**San Mateo County LEARNING MANAGEMENT SYSTEM**

Home Learning Performance **My Team** Reports Compliance

**Performance Feedback, Coaching, and Reviews**

On this page, managers can access and document information regarding the performance and development of their direct reports. Using the Comments tab below, you can record your observations about your staff performance, summarize your coaching efforts, and upload relevant documents. You will also have access to reports and share permissions from this page.

My Team: Mary Manager

Mary Manager ADMINISTRATIVE SER. Reports Share Permissions Assign Training Create Goal

Team To Do's Action Items

01 - 02 Elvis Employee HUMAN RESOURCES TE Joe Employee Cornerstone Admini...

Title	Assigned To	Priority	Progress	Due Date
To Do #1	Elvis Employee	High	0%	11/30/2010

**C**

**To Do's:** You may assign To Do's to your direct reports on this tab.

**San Mateo County LEARNING MANAGEMENT SYSTEM**

Home Learning Performance **My Team** Reports Compliance

**Performance Feedback, Coaching, and Reviews**

On this page, managers can access and document information regarding the performance and development of their direct reports. Using the Comments tab below, you can record your observations about your staff performance, summarize your coaching efforts, and upload relevant documents. You will also have access to reports and share permissions from this page.

My Team: Mary Manager

Mary Manager ADMINISTRATIVE SER.

Team To Do's Action Items

01 - 02 Elvis Employee HUMAN RESOURCES TE Joe Employee Cornerstone Admini...

Title	Assigned To	Priority	Progress	Due Date
To Do #1	Elvis Employee	High	0%	11/30/2010

**D**

**Action Items:** Goals awaiting your approval will appear under this tab.

**San Mateo County LEARNING MANAGEMENT SYSTEM**

Home Learning Performance **My Team** Reports Compliance

**Performance Feedback, Coaching, and Reviews**

On this page, managers can access and document information regarding the performance and development of their direct reports. Using the Comments tab below, you can record your observations about your staff performance, summarize your coaching efforts, and upload relevant documents. You will also have access to reports and share permissions from this page.

My Team: Mary Manager

Mary Manager ADMINISTRATIVE SER.

Team To Do's Action Items

01 - 02 Elvis Employee HUMAN RESOURCES TE Joe Employee Cornerstone Admini...

Elvis Employee

- Test Goal #1 Approve / Deny

Joe Employee

- Will Mary see this? Approve / Deny
- Joe looking for approval Approve / Deny

## 2 CREATE A TO DO

### A CLICK ON PLUS SIGN NEXT TO “ADD TO DO”

The screenshot shows the San Mateo County Learning Management System interface. The user is logged in as Mary Manager. The 'My Team' section is active, displaying a list of team members: Mary Manager (Administrative Ser...), Elvis Employee (Human Resources TE), and Joe Employee (Cornerstone Admini...). A 'Team To Do's' window is open, showing a table of tasks. A yellow arrow points to the plus sign next to the 'Add To Do' button in the table.

Title	Assigned To	Priority	Progress	Due Date
To Do #1	Elvis Employee	High	0%	11/30/2010

### B FILL IN ALL REQUIRED FIELDS

In the pop-up window, fill in all required fields. You may select to whom (from your direct reports) you'd like to assign this **To Do**.

The 'Add To Do' pop-up window contains the following fields:

- Title: To Do #1
- Assign To: Add User (with a plus sign icon) and Elvis Employee (with a trash icon)
- Due Date: 11/30/2010
- Progress: 0%
- Priority: High (selected), Medium, Low
- Description: You need to get this done now!

Buttons for 'Save' and 'Cancel' are located at the bottom right of the window.

### C CLICK SAVE

Your employees will now be able to manage their **To Do's** from their **Home** tab.



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# Performance Feedback & Coaching (For Supervisors)

## 3 VIEW DIRECT REPORTS' INFORMATION

The screenshot shows the 'San Mateo County LEARNING MANAGEMENT SYSTEM' interface. The navigation bar includes Home, Learning, Performance, My Team, Reports, and Compliance. The 'My Team' page displays a list of employees: Mary Manager (MANAGEMENT ANALYST), Ed Employee (ACCOUNTANT I), and Ellen Employee (ACCOUNTANT I). A callout box labeled 'A' points to the name 'Ed Employee'.

**A**

Click on the name of one of your direct reports to view his/her **Tasks, Profile, Performance, Calendar, and Comments.**

The screenshot shows the 'San Mateo County LEARNING MANAGEMENT SYSTEM' interface. The navigation bar includes Home, Learning, Performance, My Team, Reports, and Compliance. The 'My Team' page displays a list of employees. A callout box labeled 'B' points to the 'Tasks' tab in the employee's profile view.

**B**

**Tasks:** Will include Action Items from Goals, as well as Assigned Training and Assigned Tasks.

The screenshot shows the 'San Mateo County LEARNING MANAGEMENT SYSTEM' interface. The navigation bar includes Home, Learning, Performance, My Team, Reports, and Compliance. The 'My Team' page displays a list of employees. A callout box labeled 'C' points to the 'Profile' tab in the employee's profile view.

**C**

**Profile:** Includes the employee's general information and LMS transcript.

## Performance Feedback & Coaching (For Supervisors)

D

**Performance:** The Performance tab offers a “one-stop shop” interface where you can view all of your direct report’s goals, including progress, status, and completion dates.

The screenshot shows the 'San Mateo County LEARNING MANAGEMENT SYSTEM' interface. The 'My Team' tab is selected, displaying a list of team members: Mary Manager (Administrative Ser.), Elvis Employee (Human Resources TE), and Joe Employee (Cornerstone Admini...). The 'Performance' sub-tab is active, showing a 'Goals' section with two entries: 'HR Department Sample Goal 1' and 'HR Dept Demo Goal 1'. Both goals show 0% progress and a status of 'Goal not started' with a target completion date of 6/30/2011. A navigation bar at the top includes Home, Learning, Performance, My Team, Reports, and Compliance. A secondary navigation bar includes Tasks, Profile, Performance, Calendar, and Comments.

E

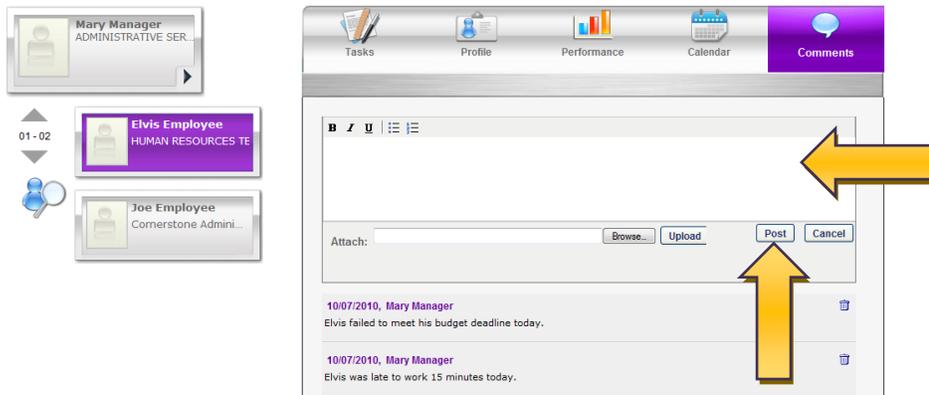
**Calendar:** View your direct report’s important LMS dates here, including training dates, goal milestones, etc.

The screenshot shows the same 'San Mateo County LEARNING MANAGEMENT SYSTEM' interface. The 'Calendar' sub-tab is active, displaying a monthly calendar for October 2010. The calendar grid shows dates from Sunday (26) to Saturday (2). The 14th of October is highlighted. The team member list on the left remains the same. The navigation bars are consistent with the previous screenshot.

## 4 ADD COMMENTS

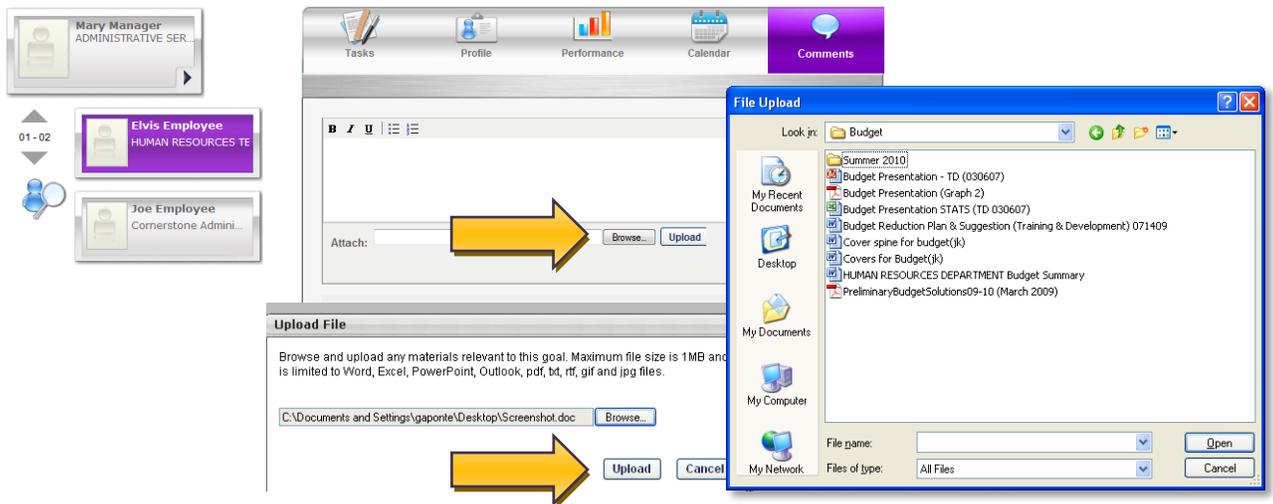
You can use **My Team** as a virtual supervisory drop-file to add comments and attachments to document performance. All information on **My Team** is confidential and available only to you.

### A POST COMMENTS



Type your comments into the **Comments Field** and click **Post**. Your comments will be time-stamped and can be used to summarize the feedback you have provided to your direct reports and save the notes from your coaching sessions.

### B ADD ATTACHMENTS



To add any attachments, click on **Browse**, search for the file you wish to upload on your system, and then click **Upload**.

# PERFORMANCE REVIEW & EVALUATION

## OVERVIEW OF PERFORMANCE REVIEW AND EVALUATION PAGE

To access the **Performance Review and Evaluation** page, hover your mouse over the **Performance** tab on the LMS Home page and click on **My Performance Review and Evaluation**.

The screenshot shows the San Mateo County Learning Management System interface. The top navigation bar includes Home, Learning, Performance (selected), My Team, Reports, and Compliance. A sub-menu is open under Performance, showing links for Performance Planning and Goal Setting, My Performance Review and Evaluation (highlighted with a yellow arrow), and Resources. The main content area displays a welcome message for Mary Manager and several sections: Upcoming Sessions (0 sessions scheduled), Training (No Training Available), Online Training in Progress (No in-progress training), Your Inbox (0 approved training selection(s)), My Personal Health and Well Being Site, and Browse for Training (listing various categories like Career/Life Planning, Computer Training, etc.).

You will see a review link on this page that you can click on once the review period has opened. Click on it and follow the on-screen steps to complete.

If it is not currently review period time, there will be nothing available on this screen.

The screenshot shows the 'My Performance Review and Evaluation - Mary Manager' page. It includes a sub-header and a paragraph explaining the page's purpose. Below is a table titled 'Performance Reviews' with columns for Name, Review Period, Start Date, Completion Date, Status, and Rating. The table contains the text 'No Record Found'.

Name	Review Period	Start Date	Completion Date	Status	Rating
No Record Found.					

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## PERFORMANCE FACTOR EXPECTATIONS

At the beginning of the performance cycle, there will be an opportunity for supervisors and employees to discuss and document expectations regarding CPMS Performance Factors.

LMS will generate a task to request supervisors and their direct reports to review the list of Performance Factors and post comments. Supervisors will receive an LMS email when these Factors are ready to be reviewed and will start the process.

**A** CLICK ON THE PERFORMANCE FACTORS LINK UNDER “YOUR TASKS” ON THE LMS HOME PAGE

The screenshot shows the LMS home page for San Mateo County. The navigation bar includes Home, Learning, Performance, My Team, Reports, and Compliance. The main content area features a welcome message and several sections: 'Your Upcoming Sessions' (No sessions scheduled), 'My Training' (No Training Available), 'Online Training in Progress' (No in-progress training), 'Your Inbox' (0 approved training selection(s)), 'My Personal Health and Well Being Site' (Click here to select the "My Personal Health & Well Being Site"), and 'Your Tasks'. A yellow arrow points to the 'Your Tasks' section, which lists a task: 'Demo-Performance Factors Expectations Setting for Ed Employee' with a due date of 12/14/2010. Other sections include 'County Training & Development Guide' and 'Browse for Training'.

**B** REVIEW THE WORKFLOW DIAGRAM AND INSTRUCTIONS ON THIS PAGE AND CLICK CONTINUE

The screenshot shows the 'Performance Factors Expectations Setting' page for Ed Employee, ACCOUNTANT I. The page includes a navigation bar with Home, Learning, Performance, My Team, Reports, and Compliance. The main content area features a 'Welcome | Scheduled Tasks | Announcements | To Do's' section. Below this, there is a 'Performance Factors Expectations Setting' section with a 'Review Period: 7/1/2010 - 6/30/2011'. The 'Overview' section contains instructions: 'The purpose of this section is for the Supervisor and Employee to work together in identifying the performance factors critical to this position during this review period.' Below the instructions is a 'Review Steps' section with a workflow diagram: 'Supervisor Review and Customization of Performance Factors' (Due Date: 12/14/2010) -> 'Employee Review and Comments on Performance Factors' -> 'Supervisor Finalization of Performance Factors'. A yellow arrow points to the 'Continue' button at the end of the workflow.

**C COMPLETE THE FORM**

Home Learning Performance My Team Reports Compliance

Welcome Scheduled Tasks Announcements To Do's

Demo-Performance Factors Expectations Setting  
Review Period: 7/1/2010 - 6/30/2011

Ed Employee  
ACCOUNTANT I

Overview  
Performance Factors E...

Save Cancel Print  
Submit

Performance Factors Expectations Setting

Instructions

Dear Mary Manager and Ed Employee:

Please review detailed Performance Factor descriptions. Select the factors that are most critical to successful performance for this job, employee, and review period. Provide comments (explanations, examples, etc.) as appropriate to describe expectations.

To see the rating levels for performance factors, click [HERE](http://intranet.co.sanmateo.ca.us/hr/CPMS) to access the CPMS Resource site

INDIVIDUAL CONTRIBUTION  
Quantity  
Quality  
Innovation  
Level of Effort  
Commitment to Service  
Attendance  
Attention to Safety

Comments:  
B I U

The supervisor will start the process by posting his or her comments. These comments are intended to indicate the Factors that are most critical to successful performance for this job, employee, and review period and to provide any examples and explanations that might be helpful to describe expectations.

**C CLICK CONTINUE**

Previous Save Continue Submit

The Factors with the supervisor's comments will then be available for the employee's review. The employee will also follow steps **A-C** to add his/her comments.

**D SUPERVISOR SUBMITS FINAL FORM**

The supervisor will be prompted via LMS email to review the employee's Factor comments. Once reviewed, the supervisor will click **Submit**.

**E ACCESS THE COMPLETED FACTORS DOCUMENT**

The completed form will be available for both the employee and supervisor to review throughout the performance cycle. Once finalized, the Factors document will be in Adobe PDF format and will not be editable by either party.

This document will provide a helpful reference during feedback and coaching sessions, interim reviews and the year-end performance evaluation.

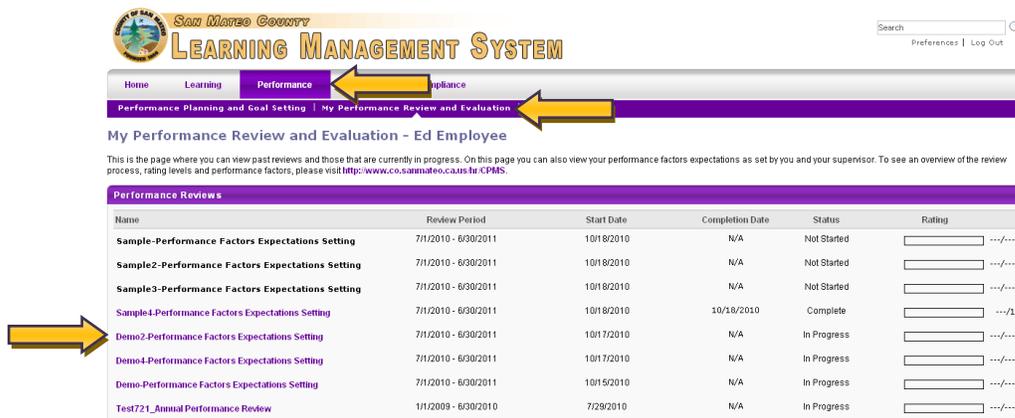
**1 SUPERVISOR ACCESS**

The supervisor may access the completed Factors document in **My Team**, under the employee's **Performance** tab.



**2 EMPLOYEE ACCESS**

The employee may access this document at **My Performance Review and Evaluation**, under the **Performance** tab.



# RESOURCES

## RESOURCES

The **Performance** tab in LMS contains many helpful CPMS resources. Simply click on **Resources** under the **Performance** tab to access these.



You may also visit [www.co.sanmateo.ca.us/hr/cpms](http://www.co.sanmateo.ca.us/hr/cpms) to access the CPMS web site.

**What is CPMS?**

Performance management, in general, is really about good people management. Specifically, CPMS is a systematic and ongoing process of communication and collaboration between a supervisor and an employee during a year-long performance management cycle that aligns individual performance to the County's strategic priorities and supports individual learning and development. The performance management cycle has three parts:

- Performance Planning and Goal Setting: to clarify expectations, set goals and define what successful performance looks like, as documented in the employee's individual performance plan (see below)
- Performance Feedback and Coaching: to let employees know how they are doing and encourage learning and effective future performance
- Performance Review and Evaluation: to discuss and document performance during the year based on feedback given throughout the cycle, and set the stage for next year's performance planning and goal setting

1. [What is CPMS?](#)
2. [What are the elements of a Performance Plan?](#)
3. [What are the benefits of CPMS?](#)
4. [Why was CPMS Developed?](#)
5. [How will CPMS be rolled-out?](#)
6. [What are CPMS dates?](#)
7. [What tools and resources are available?](#)
8. [How will the LMS Performance Management Module help?](#)
9. [Who can I contact for help?](#)
10. [Other Online Resources](#)

### Resources include:

- The CPMS Process Guide
- Procedural “How-To” guides on various topics, like goal setting and performance review
- An FAQ section
- Videos
- Templates