Overview

- This job aid is intended for HRCs and managers to understand their roles in conducting a Performance Improvement Plan (PIP).
- For a manager to administer a PIP, the Performance Admin must first configure the PIP and run the annual eligibility batch process.
- If an employee is underperforming or engaging in misconduct, a manager must report the employee’s actions to HR. The manager then meets with an HRC to determine procedure. If written documentation is necessary, a PIP is launched by the HRC.
- The document flow for the PIP is:
  1. Manager creates PIP.
  2. HRC reviews and approves [or returns to manager for edits].
  3. The manager has the performance discussion with the employee.
  4. The manager releases the PIP to the employee.
  5. The employee acknowledges the document. [or if employee refuses to acknowledge, the HRC can manually move the document forward]
  6. The manager finalizes the document.

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I. Navigating to the Performance Module (HRC)

1. You can access Performance in two ways:
   a. Click the Navigator icon in upper left-hand corner of the Ignite landing page.
   b. Under the My Client Groups section, click the drop-down arrow, and select Performance from the options.
c. (Option 2) Under the **My Client Groups** heading on the home page, you can click on the **Performance** tile on the Ignite main page.
II. Navigating to the Performance Module (managers)

I. You can access Performance in two ways:
   a. Click the Navigator icon in upper left-hand corner of the Ignite landing page.
   b. Under the My Team section, click My Team, and select Career and Performance from options.
c. (Option 2) Under the **My Team** heading on the home page, you can click on the **Career and Performance** tile on the Ignite main page.
III. Administering a PIP to an employee (managers)

1. Under **Goals and Performance Overview**, select the name of the employee.

2. Under **Anytime Documents**, click the **+ Add** button.
3. The only thing you need to select is the Performance Document Name. The rest should autofill. Then click **Save**. After you save, the window will close. You will then need to open the document to complete it (see next step).

d. **Performance Document Name:** select the current performance period (it should be the only choice in the drop down)

e. **Description:** Leave this field blank.

f. **From Date:** should autofill with the first day of the performance period. You do not need to change it.

g. **To Date:** should autofill with the last day of the performance period. You do not need to change it.

h. **Performance Document Manager:** should autofill with the name of the employee’s manager
IV. Filling out a PIP (managers)

1. Under Anytime Documents, click on the name of anytime document to be filled out.

2. It is possible to edit the fields in Document Details, but there should be no need. Leave as is.
3. Review and evaluate the contents of each topic included in the evaluation.
   a. Select **Evaluate**.

   ![Evaluation Screen](image)

   b. Answer all required questions on the questionnaire. When done, click **Save and Close**. NOTE: this is a partial screen shot and there are more questions than shown here.

   ![Questionnaire Screen](image)
c. To add attachments, click the **down arrow** to open the section and then click **Edit**.

d. Finally, click **Submit** and the document will be sent to the HRC for review.
V. Approving a PIP (HRC)

After the manager fills out the PIP, they will submit it and send it for HRC approval.

1. Open the PIP by clicking on the notification bell on the top right-hand side, then select the approval request.
2. Review the plan, then approve or reject it.
   a. To review the plan, scroll down in the pop-up window and select **Go to performance document: Performance Document**. Make sure you keep this pop-up window open.

   ![Performance Document Approval Requested]

   b. Select **View** to view the PIP.

   ![Evaluation Topics]
c. After viewing the filled-out PIP, go back to the pop-up window and select **Approve** or **Reject**.

d. Whether approving or rejecting, the HRC should add comments or attachments if necessary, then select **Submit**. **NOTE:** the comments are difficult for the recipient to find. If you are recommending changes, please communicate the changes a different way (e.g., phone, email, in person, etc.)

e. If rejected, the plan will be routed back to the manager for edits. Once edits are made, the document is routed back to the HRC for review and approval.
VI. Manager has the performance discussion with their employee

1. Once approved by the HRC, the manager can print the document to share with their employee. Go to My Team >> Career and Performance >> select the employee’s name >> open the Anytime Document.

2. After the discussion, share and release the document so the employee will have an electronic copy.
VII. Employee acknowledges the document

I. To acknowledge receipt of the document, the employee goes in to Career and Performance >> Performance >> select current Anytime Document.

II. Here, the employee can View the document and Print the document.

III. The employee then clicks Yes to acknowledge the document, even if they don't have feedback comments.

IV. The employee can make any final comments if they choose. Selecting Save and Close will save their comments in case they want to come back and add or edit later. Once finished with comments, the employee clicks Submit to acknowledge the document.
VIII. HRC forces document to manager finalization [if necessary]

If an employee does not acknowledge the PIP once the manager releases it or resigns before the process can be completed, the HRC will then manually force the document forward to the manager acknowledgement step.

1. Under Administration, click on Performance Documents.

2. Under Filters, input the following information:

   a. **Review Period**: select the appropriate review period
   b. **Performance Document**: select Performance Document
   c. **Employee**: type in the name of the employee
   d. **Current Task**: select Employee Acknowledges Performance Document
3. To move the task forward, click the empty box next to the performance document so that there is now a check mark, then select the **Actions** drop-down menu.

Then, select **Move Task Forward**.

4. On this page, select the **Reason** drop-down, and select the appropriate reason.

5. After selecting the appropriate reason, press **Submit**.

The PIP is now available for the manager to acknowledge.
IX. Share and release PIP to employee (managers)

Before you release the PIP, you should have had a performance improvement meeting with your direct report.

1. Under **Performance Overview**, select the name of the employee.

![Image of Performance Overview]

2. Under **Anytime Documents**, under the performance document, notice that the task completion bar fills up after every step completed. By clicking on the downward-pointing arrow to the right of the task completion bar, you can see the steps for this performance document, including what is completed and what step you are currently on.

![Image of Anytime Documents]
3. On this page, select **Share and Release** to share the evaluation with the employee. You may add comments if necessary.

4. The performance document is now shared with the employee. It is now the employee’s responsibility to acknowledge the PIP. If they do, you will then acknowledge the employee’s response. If they do not, the HRC will forward the document to you so you can acknowledge the document.
X. Manager finalizes performance document

Before you release the PIP, you should have had a performance improvement meeting with your direct report.

1. Under **Performance**, select the name of the employee.

2. Under **Anytime Documents**, select the **performance document**.

3. On the page entitled **Manager Finalizes Performance Document**, read the employee’s comments on the page, if any, then select **Yes** to finalizing the performance document.
4. Add final comments if necessary, then select **Submit**.
XI. Manager creates PIP check-in

After the PIP is finalized, the process is not yet complete. The next step is creating a Performance Improvement check-in form.

1. Under **Performance Overview**, select the name of the employee.

   ![Performance Overview Screen](image1)

2. Under **Check-Ins**, click + Add to add a check-in.

   ![Check-Ins Screen](image2)

3. Fill out the appropriate details of the check-in and **Save**.

   ![Check-Ins Screen with Fill-Out](image3)

   a. **Template**: Performance Improvement Check-In
   b. **Document Name**: this will auto-fill with the name of the template and the date
   c. **Date**: this will auto-fill with the current date

4. From here, you should hold weekly meetings performance meetings that keep the goals of the PIP in mind, entering a new check-in form for every weekly meeting.
XII. Update check-in form with topics discussed

After each weekly meeting, you should be updating the check-in form answering the questions.

1. Under **Performance Overview**, select the name of the employee.

   ![Performance Overview Image]

2. Under **Check-Ins**, select the check-in document.

   ![Check-Ins Image]

3. Enter the manager questionnaire.
   a. Click on the downward-facing arrow next to the manager questionnaire.
   
   ![Questionnaire Image]
   b. Select **Edit**.
4. Answer the following questions, then click **Save**.

![Questionnaire For Mr. Testuser_BAYLOR_s39](image1)

5. After saving your responses, click the back arrow at the top left-hand corner.

![Performance Improvement Check-In 01/22/2020](image2)

This check-in form is now complete.

Repeat XI and XII after for each check-in meeting that occurs.