



October 22, 2003

**OKLAHOMA BULLETIN NO. OK360-4-5**

**SUBJECT: PER – PERFORMANCE PLANS FOR FY 2004**

**Purpose:** To provide instructions for establishing new performance plans in I\*CAMS for FY2004.

**Expiration Date:** September 30, 2004

**Action Required By: November 22, 2003**

Generally, performance plans are created at the beginning of the fiscal year. This involves a three step process:

- The supervisor creates the plan
- Then the employee views the plan
- The final step is for the supervisor to finalize the plan.
- All steps must be completed in a timely manner to allow the appraisal to be completed.

The following is step-by-step instructions for establishing performance plans in I\*CAMS:

**SUPERVISOR CREATES THE PLAN**

**Step 1:** Log on to I\*CAMS. Under Manager, click on “Tasks”.

**Step 2:** Click on “Performance”.

**Step 3:** Click on “Performance Plan”.

**Step 4:** Select an employee by clicking “New Plan”.

**Step 5:** Enter Start Date for Performance Plan, for example, 10/1/2003. Click “Add”. This date may be later if the previous year’s plan was extended to meet the “90-day rule”.

**Step 6:** Check employee information on the “Initiate Performance Plan” screen to make sure it is correct. If it is not correct, please contact the Human Resources office.

**Step 7:** Click the “Elements and Standards” tab to select elements.

**You have 2 options in this step.**

**Option 1:** You can copy the plan from the previous year by clicking on the “Copy Plan for Previous Year”. If you choose this option, the previous year’s performance plan will appear on your screen. After reviewing the elements for accuracy, click the “Save” button one time. A blue SAVED will flash when saved. The plan will flow to the employee’s worklist and an email will be sent to notify the employee of the worklist item.

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**Option 2:** Click (+) on right side of screen. You can add elements by clicking the lookup . In “Lookup Pick Element” click on Lookup to get a list of elements. By clicking on an element, you select it and it is added to the elements in the plan. Click (+) to add additional elements. **Tip:** You may want to print the page listing the elements numbers so the element numbers can be typed directly into the element box. Click “View All” to see all the elements. Continue until all elements are chosen. There can be no less than 2 elements, and no more than 5. Keep in mind that all employees must have an EO/Civil Rights Element. I\*CAMS automatically adds the EO/CR element. There is an EO/CR element for supervisors and a different one for non-supervisory employees. Supervisors should check to see that the appropriate one has been inserted. When all elements have been selected, click the “Save button one time. A blue **SAVED** will flash when saved.

Once the Performance Plan is created by the supervisor, the employee will receive an e-mail notifying them of this action. The employee should log on to I\*CAMS to view the Performance Plan.

### **Employee Views the Performance Plan**

**Step 1:** Log on to I\*CAMS.

**Step 2:** To view your Performance Plan, click on “Worklist”.

**Step 3:** Click on the link next to “Supervisor Created Your Plan”.

**Step 4:** Review the Perf Plan tab and Elements and Standards tab to verify information. On the Elements and Standards tab Click on View All to see all the elements.

**Step 5:** On the Perf Plan tab Click on the “Viewed/Discussed Plan” box located at the bottom.

**Step 6:** Click “Save” once.

Once the employee has viewed and saved the Performance Plan, an e-mail is sent to the supervisor notifying them of this action. The supervisor will log in to I\*CAMS and finalize the Performance Plan.

### **Supervisor Finalizes the Performance Plan**

**Step 1:** Log on to I\*CAMS.

**Step 2:** Click on Worklist.

**Step 3:** Click on the link next to “Employee Viewed the Plan”.

**Step 4:** Click the “Finalized Plan” box, then click the “Save” button.

**Note: This step must be done or the Progress Review or Summary Rating cannot be completed.**

Questions concerning this bulletin may be directed to Linda D. Garabedian, Human Resources, at (405) 742-1210.

/s/

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DIST: AO