

PERFORMANCE EVALUATION FOR SEPARATING EMPLOYEE (PESE)

When an employee separates from state government for reasons other than documented disciplinary action, retirement, disability, illness or death, the Performance Evaluation for Separating Employee (PESE) task may be used. This task is available regardless of the length of time the employee's performance plan has been in place.

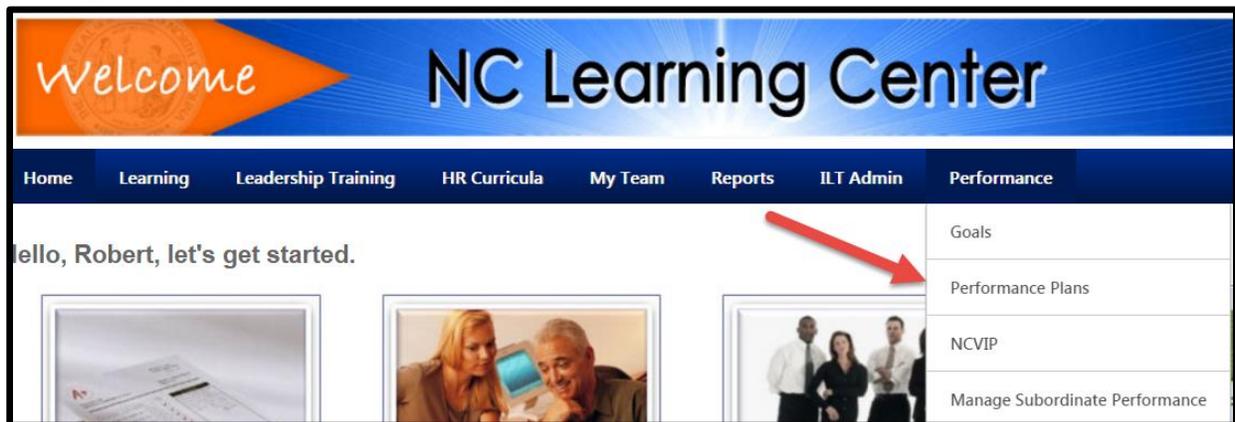
Upon notice that an employee is separating, the manager may launch the PESE task. There is a total of ten (10) calendar days to complete the entire cycle.



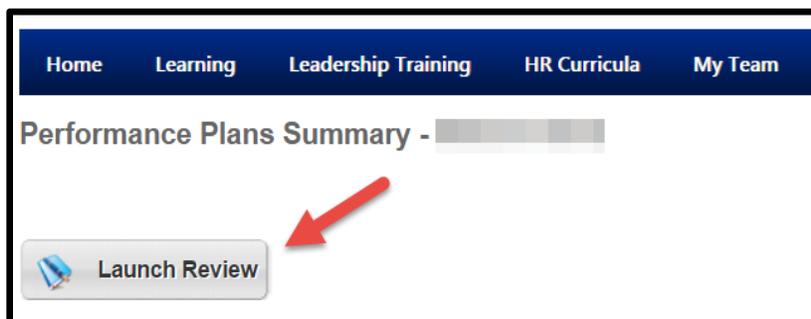
STEP 1: Manager Launches PESE Task

Steps you should take:

1. Manager/Supervisor: In NC Learning Center: Click **“Performance Plans.”**



2. Click on the **“Launch Review”** button.



3. Select “**Someone else**” (1) and locate the separating employee by clicking  (2) and typing in the employees name. Then “**Select Review Form**” (3).

4. Select the form labeled, “**Performance Evaluation for Separating Employee (PESE).**”

5. Enter the Date of Separation (1) and the Review Period (2). The Review Period should cover the time period the employee spent under the Performance Plan. Once this information has been entered, click “**Launch.**”

Launch Performance Review

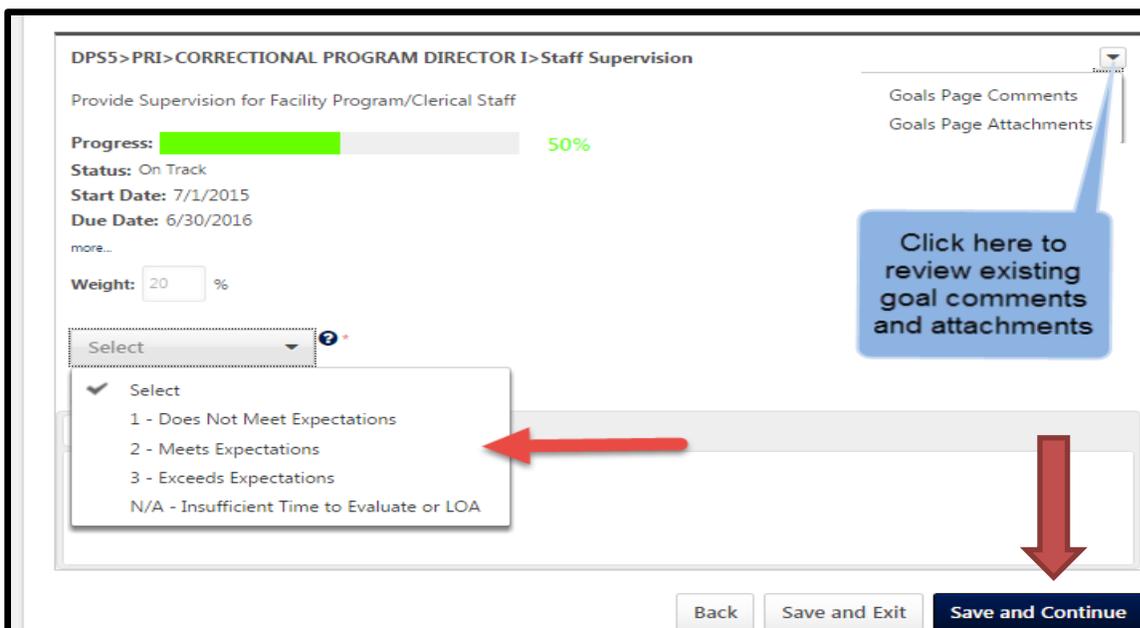
6. Once you click “**Launch**” in the step above, you will be automatically sent to the Performance Plans Summary page. Find the “**Separation**” task you just created and click on it. **DO NOT CLICK “LAUNCH REVIEW”** at this step in the process.



7. Click “**GET STARTED**”



8. Here you will see each goal to be rated. You as the manager will select the rating from the dropdown (red arrow) for each goal. You will also enter any summary comments supporting the rating justification. To see any comments added to the goal select the dropdown arrow in the right corner (blue bubble). Once all goals have been rated with supporting documentation, click “**Save and Continue.**”



9. You will then rate each value and provide any supporting comments just as you did for the goals. If you added comments to the DPS Values Goal in Step 8 above, you may simply reference those comments by adding “See Values Goal”. After rating each value, scroll to the bottom and select “SAVE AND CONTINUE”.

Statewide Core Value - Safety & Health

Consistently demonstrates a strong commitment to providing state employees with a safe and healthy workplace. Proactively identifies and reduces, or takes action to reduce, risks and hazards and abides by regulatory requirements. Understands the importance of safe work practices and personal protective equipment, enables assigned employees to do the same, and acts to correct unsafe conditions, not waiting for others to correct issues. Develops, implements, and evaluates work processes (utilizes Hazard Recognition practices) that address immediate risk and also improves systems to address future risk

2 - Meets Expecta...

Comments:

Back Save and Exit Save and Continue Submit

10. You will then see a summary screen that provides you with an overall rating calculation.

Summary

Overall Rating 1.7-2.6 Meets Expectations

	Manager Complete Separating Employee Evaluation (100%)	Separating Employee Sign Off	Manager Sign Off
*Goal Rating Section	2.0/3.0 2 - Meets Expectations (50%)	-	-
*Organizational Values Rating Section	2.0/3.0 2 - Meets Expectations (50%)	-	-
Overall	2.0/3.0 1.7-2.6 Meets Expectations		

Back Submit

11. After reviewing the Summary, click “**SUBMIT**”.
12. You will be prompted to verify your submission. Click “**SUBMIT**”.

Submit Review

You will not be able to modify once you have submitted. Are you sure that you want to submit now?

Cancel Submit

This advances the Separations Task to the employee.

STEP 2: Employee Reviews and Signs Separations Task

13. Upon clicking the **MY TASK LIST** from the LMS/NCVIP homepage, the employee will select “Complete Separating Employee Sign Off.”

Title	Description	Status	Start Date	Due Date
 Complete Separating Employee Sign Off (03/31/16) 	Performance Evaluation for Separating Employee	Not Started	3/15/2016	3/17/2016

14. Click “**GET STARTED**”.

Review Step Progression

-  Manager Complete Separating Employee Evaluation 
Due: 3/20/2016
-  Separating Employee Sign Off 
-  Manager Sign Off 

 **Get Started**

15. You will see the supervisor’s rating and comments (yellow highlight below) for each goal. You can also review the goals page comments and attachments.

DPS3>PRI>CORRECTIONAL PROGRAM DIRECTOR I>Correctional Programs 

Manage/Coordinate Facility Rehabilitative Programs

Progress: 50%

Status: On Track

Start Date: 7/1/2015

Due Date: 6/30/2016

more...

Weight: %

 (Manager) Rated: 2 - 2 - Meets Expectations Review: Performance Evaluation for Separating Employee (PESE) Time: 3/15/2016 2:40 PM

Goals Page Comments

Goals Page Attachments

16. After reviewing each goal, scroll down and select “**SAVE AND CONTINUE**”.
17. You will then review each value just as you did for goals.
18. After reviewing each value, scroll to the bottom and select “**SAVE AND CONTINUE**”

19. You will then see a summary screen that provides you with the manager's rating of the employee on the goals and values. You will also see the overall rating (yellow highlight).

	Manager Complete Separating Employee Evaluation (100%)	Separating Employee Sign Off	Manager Sign Off
*Goal Rating Section	2.0/3.0 2 - Meets Expectations (50%)	N/A	-
*Organizational Values Rating Section	2.0/3.0 2 - Meets Expectations (50%)	N/A	-
Overall ?	2.0/3.0 1.7-2.6 Meets Expectations		

After reviewing, select “NEXT”.

20. The employee will now complete the signature and approval of the Separations Task by adding any summary comments (1), selecting the Acknowledgement box (2), Electronically signing (3), and Submitting (4).

Sign Off (PESE)

Electronic Signature Agreement:
By clicking the acknowledge checkbox and the "Sign" button, you are signing this electronically, as your name appears in the REACON system. You acknowledge that you have had an opportunity to review the entire document before clicking the

Self **2**

I acknowledge that providing my electronic approval is equivalent to signing this document and I understand that my electronic signature is binding. **3**

Manager
Pending Signature

1

4

The Separations Task returns to the manager for final signature.

STEP 3: Manager Comments and Signs

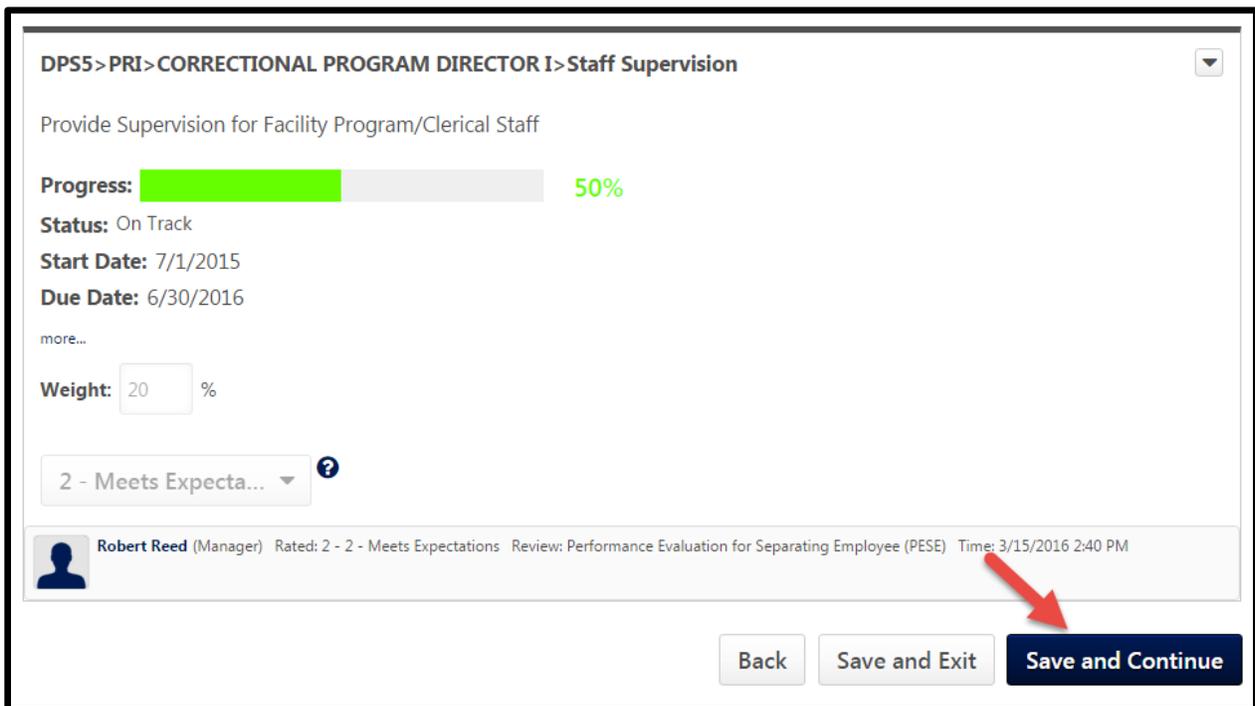
21. Upon clicking the “MY TASK LIST” from the LMS/NCVIP homepage, select the employee you are completing the Separation Task for.

Title	Description	Status	Start Date	Due Date
 Complete Separating Manager Sign Off (03/31/16)	Performance Evaluation for Separating Employee	Not Started	3/15/2016	3/17/2016

22. Click “GET STARTED”.



23. You will be able to conduct a final review of the Separation Task including any overall attachments added by the employee for goals and values. After reviewing each goal, scroll down and select “SAVE AND CONTINUE”.



DPS5>PRI>CORRECTIONAL PROGRAM DIRECTOR I>Staff Supervision

Provide Supervision for Facility Program/Clerical Staff

Progress: 50%

Status: On Track

Start Date: 7/1/2015

Due Date: 6/30/2016

more...

Weight: %

2 - Meets Expecta... ?

 Robert Reed (Manager) Rated: 2 - 2 - Meets Expectations Review: Performance Evaluation for Separating Employee (PESE) Time: 3/15/2016 2:40 PM

Back Save and Exit **Save and Continue**

24. You will then review each value just as you did for goals.

25. After reviewing each value, scroll to the bottom and select “SAVE AND CONTINUE”

26. You will see one final overall rating. Select “NEXT” to advance to the signature page.

Summary			
Overall Rating ⓘ 1.7-2.6 Meets Expectations			
	Manager Complete Separating Employee Evaluation (100%)	Separating Employee Sign Off	Manager Sign Off
*Goal Rating Section	2.0/3.0 2 - Meets Expectations (50%)	N/A	2.0/3.0 2 - Meets Expectations
*Organizational Values Rating Section	2.0/3.0 2 - Meets Expectations (50%)	N/A	2.0/3.0 2 - Meets Expectations
Overall ⓘ	2.0/3.0 1.7-2.6 Meets Expectations		
<input type="button" value="Back"/> <input type="button" value="Next"/>			

27. The manager will now complete the signature and approval of the Separations Task by adding any summary comments (1), selecting the Acknowledgement box (2), Electronically signing (3), and Submitting (4).

Sign Off (PESE)

Electronic Signature Agreement:
By clicking the acknowledge checkbox and the “Sign” button, you are signing this electronically, as your name appears in the BEACON system. You also agree that you have had an opportunity to review the entire document before clicking the signature. You agree and understand that this electronic document may be used similar to the ways in which paper documents are used.

Self
[Redacted] Date:3/15/2016

Manager

I acknowledge that providing my electronic approval is equivalent to signing this document and I understand that my electronic signature is binding.

28. The Separation Task will now be complete. The employee can locate the PDF of the Separation Task by going to “**PERFORMANCE**” then “**PERFORMANCE PLANS**” from the main page.



29. Click on the “**MY PERSONAL REVIEWS**” tab. You will see all documents for the current cycle here. Simply click on the document you wish to see. It will open as a PDF document.

Performance Reviews							
My Assigned Reviews		My Personal Reviews					
							(4 Results)
Review	Review Period	Start Date	Completion Date	Task Status	Rating	Attachments	
03/31/16 (Performance Evaluation for Separating Employee (PESE))	7/1/2015 - 3/15/2016	3/15/2016	3/15/2016	Complete	<div style="width: 100%; height: 10px; background-color: #0056b3;"></div>	2.0 / 3.0 - 17.26 Meets Expectations	