Supervisor Creates Performance Improvement Plan (PIP)

MANAGER (Rater)

Revised: 7/16/2018
Manager (Rater) Creates Performance Improvement Plan

Once the Performance review is completed, a Performance Improvement Plan (PIP) may be needed. A PIP can be initiated anytime a Manager (Rater) identifies employee performance and/or behavioral issues that need correction and to help guide the employee to improve or modify behavior by providing a plan of corrective action. A PIP is required if an Employee is rated below “Meets Expectations” on his or her Overall Performance Review summary. The PIP has an evaluation period (begin and end date) based upon what the Manager (Rater) feels is necessary to complete the Improvement Plan.

Manager (Rater) Creates Development Document

A Manager (Rater) will need to create the Performance Improvement Plan (PIP) for the employee based on the development needs of the Employee from the Performance Review. A PIP will need to be created for the identified Employee before the criteria can be entered.

1. Manager (Rater) Navigates to: myOhio > My Workspace > Self Service Plus > Manager Tasks > ePerformance Development > Create Development Documents.

2. Click the checkbox in the Select column next to the identified Employee to create the Performance Improvement Plan Document.

3. Click the Continue button.
4. Choose the **Period Begin Date**, **Period End Date**, **Document Type** (Performance Improvement Plan), **Clone From Prior Document** (No), and **Template** (Performance Improvement Plan).

![Create Development Documents](image)

5. Click the **Create Documents** button.

6. A confirmation message appears indicating that the document was created successfully.

![Create Development Documents - Results](image)
Manager (Rater) Establishes Criteria for PIP

Once the Development Document is created, a Manager (Rater) can enter the criteria for the document.

1. Navigate to the employee’s performance review: *myOhio > My Workspace > Self Service Plus > Manager Tasks > ePerformance Development > Current Development Documents*.

2. Click the *Document Type* hyperlink for the listed employee.

3. Click the *Start* hyperlink next to the *Establish Evaluation Criteria* step.
4. Update the Improvement Opportunity Section by clicking the Add Improvement Opportunity hyperlink in Section 1.

5. Enter the appropriate information in the Title and Description fields.

6. Click the Update button. If additional Improvement Opportunities are needed, click the Add Improvement Opportunity hyperlink, enter the appropriate information into the Title and Description fields, and click the Update button.

7. Update the Improvement Plan Section by clicking the Add Improvement Plan hyperlink in Section 2.

NOTE: Each Improvement Opportunity should have a corresponding Improvement Plan.
8. Enter the appropriate information into the *Title, Description, Item Start Date, and Item End Date* fields.

![Add Improvement Plan](image)

9. Once completed, click the *Update* button. If additional Improvement Plans are needed, click the *Add Improvement Plan* hyperlink, enter the appropriate information into the *Title, Description, Item Start Date,* and *Item End Date* fields, and click the *Update* button.

10. Once the *Improvement Opportunity* and *Improvement Plan* sections are final, click the *Save* button.

11. Click the *Complete* button.
12. On the **Complete Development Criteria** page, click the **Complete** button.

![Development Document - PERFORMANCE IMPROVEMENT PLAN]

**Complete Development Criteria**

You have almost finalized your development criteria document. If you have no further entries, select the Complete button at the bottom of this page to complete this document.

![Complete button]

13. Review the **Document Details** page.

![Current Development Documents]

**Document Details**

DIEDRE Ferris, Customer Service Assistant 1
PERFORMANCE IMPROVEMENT PLAN: 11/05/2012 - 11/29/2012

- You have successfully completed the Establish Criteria step.

<table>
<thead>
<tr>
<th>Development Document Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employee:</strong> DIEDRE Ferris</td>
</tr>
<tr>
<td><strong>Document Type:</strong> PERFORMANCE IMPROVEMENT PLAN</td>
</tr>
<tr>
<td><strong>Template:</strong> PERFORMANCE IMPROVEMENT PLAN</td>
</tr>
<tr>
<td><strong>Manager:</strong> LIGA Baker</td>
</tr>
</tbody>
</table>

| **Job Title:** Customer Service Assistant 1 |
| **Period:** 11/05/2012 - 11/29/2012 |
| **Document ID:** 724 |
| **Status:** In Progress |

**Document Progress**

<table>
<thead>
<tr>
<th>Step</th>
<th>Status</th>
<th>Due Date</th>
<th>Action</th>
<th>Next Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Establish Evaluation Criteria</td>
<td>✔ Completed</td>
<td>09/30/2012</td>
<td>View</td>
<td></td>
</tr>
<tr>
<td>Complete Manager Evaluation</td>
<td><img src="status.png" alt="Not Started" /></td>
<td>01/28/2013</td>
<td>Start</td>
<td></td>
</tr>
</tbody>
</table>

**NOTE:** Notice that the Establish Evaluation Criteria now has a Completed status.
Manager (Rater) Evaluates PIP Progress

A Manager (Rater) will need to monitor an employee’s progress throughout the timeframe of the PIP. At the completion of the time period, the Manager (Rater) will evaluate the employee’s progress toward completing the Improvement Plan(s).

1. Navigate to the employee’s Performance Improvement Plan: myOhio > My Workspace > Self Service Plus > Manager Tasks > ePerformance Development > Current Development Documents.

2. Click the Document Type hyperlink for the listed employee.

3. Click the Start hyperlink next to the Complete Manager Evaluation step.

4. Click the Expand All link located above Section 1.
5. For each of the Improvement Plans listed in Section 2, the Manager (Rater) will enter a rating and provide comments, if necessary.

![Section 2 - IMPROVEMENT PLAN](image)

**NOTE**: As with all Performance and Development documents, the Ratings Description, Check Language and Spell Check icons are available.

6. In Section 4, the Manager (Rater) has the option of providing additional overall comments regarding the employee’s PIP.

![Section 4 - MANAGER RATER COMMENTS SECTION](image)

**NOTE**: Throughout the PIP process, entries made on the document can be retained by clicking the Save button. Do not click the Save and Submit button until the ratings are complete and the PIP is ready for approval.
Attachments

The Manager (Rater) has the option of attaching additional documentation to support the PIP. Examples of appropriate documentation include: work product files, certificates, awards, etc. Inappropriate documents may include medical records or diagnoses.

1. Click the Add Attachment hyperlink.

![Image of Add Attachment button]

2. Click the Browse button.

![Image of Browse button]

3. Find and select the document by selecting the document that is to be attached.

![Image of Choose File to Upload window]
4. Click the **Upload** button.

5. Type a **Description** of the document and choose the appropriate audience from the **Attachment Audience** drop-down list.

6. Click the **Save** button.

7. Click the **Save and Submit** button. The PIP will now route through the established approval chain.

**NOTE:** The **Attachment Audience** refers to who has access to view the attachment. The “EE and Mgr” option allows both the Employee and Management to see the documents. “Mgr Only” restricts access to just Management.