



PerForms

Frequently Asked Questions

Agency HR and Supervisors are encouraged to review and follow the procedural guidance provided on VITA's COV-Apps webpage at [PerForms | Virginia IT Agency](#)

1. How do employees access the [PerForms](#) system?

Employees will receive an e-mail message at the address they use for access to Cardinal. This message will include a link to the Performance evaluation forms. Employees who are not in the Cardinal system will not be able to access PerForms. Agency HR should process and track forms for these employees using their standard processes.

2. Who can serve as an HR Initiator in [PerForms](#)?

The Agency's HR Director will determine which employees in Human Resources will serve as HR Initiators in PerForms. These employees will initiate self-evaluations and performance evaluations for their agency's employees and supervisors. HR Directors must identify initiators by following the process outlined in the PerForms Job Aid "[How to assign roles in PerForms as an agency administrator](#)."

3. Our agency already uses an in-house application to electronically process our employees' performance evaluations and related documents. Are we required to use PerForms or may we continue using our established system?

Agencies with an established electronic performance management system are not required to use PerForms. However, they may be required to provide reporting data upon request.

4. Our Agency has already completed the annual evaluations for 2024. Are we required to insert them into PerForms?

Yes, the completed evaluations may be attached to the PerForms annual evaluation. However, at least one core responsibility and one agency objective must be keyed in PerForms and the overall rating must be keyed. After submitting the form, an email notification will be sent to the employee who will need to acknowledge the evaluation. Be sure that your employees understand that nothing is changing in the evaluation/rating they've already received but that they must acknowledge and submit the documents in the automated system.



5. May Agency HR key the 2024 evaluations into PerForms for their supervisors/managers or should supervisors key them into PerForms?

Yes, HR Initiators may key the agency's annual evaluations into PerForms.

- The Initiator will need to initiate the evaluation in PerForms
- A screen with the employee's name, position, supervisor's name and reviewer will appear.
- The initiator must type in their name as the supervisor and the reviewer.
- The performance evaluation will then be accessible by the HR Initiator.
- Required entries include at least one core responsibility and one Agency Objective. Enter the overall rating and indicate approval as the supervisor and reviewer.
- By selecting the <submit> field, an email will be sent to the employee and the employee must acknowledge the evaluation.

It is up to the agency to determine if the supervisors will key the annual evaluations into PerForms or if Agency HR will do so and to communicate instructions.

6. What criteria should be used to evaluate employee's performance for the FY23-24 performance cycle?

Supervisors should use the FY23-24 Employee Work Profile's Core Responsibilities and Agency Objectives to evaluate their employees. Supervisors are advised to consider the employee's self-evaluation feedback. To add the Core Responsibilities, click "Add a Core Responsibility." Key in a brief sub-title and narrative for the Core Responsibility and include comments to support the rating selected for the Core Responsibility. Enter all that are applicable for the rating cycle.

Follow the procedures demonstrated in the [Tutorial Video: How to complete an annual evaluation as a supervisor in PerForms.](#)

7. What are the established ratings for this performance cycle?

PerForms uses the three ratings established in DHRM Policy 1.40, Performance Planning and Evaluation. These include Below Contributor, Contributor, or Extraordinary Contributor. The required documentation must be attached for an overall Below Contributor rating ([Notice of Improvement Needed form](#)) and an Extraordinary Contributor rating ([Acknowledgement of Extraordinary Contribution](#)). These forms are attached in the File Attachment area.



8. Supervisors are instructed to meet with their employees to discuss their annual performance. Is this still required now that we have an automated system?

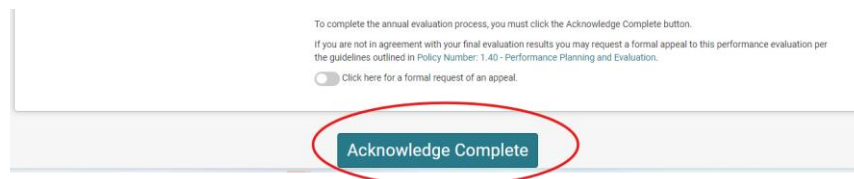
Yes, supervisors should meet with employees before submitting the annual performance evaluation. Following the evaluation meeting, supervisors will submit the evaluation to the employee for them to acknowledge.

9. May a supervisor send a copy of the evaluation form to the subordinate employee prior to their meeting through the system?

Yes, the supervisor may submit the performance evaluation and send it to employee in advance of the performance evaluation meeting. However, the employee may acknowledge the evaluation prior to the discussion.

10. How will employees sign their evaluations?

Employees will receive an email notification with a link to the annual evaluation in PerForms. After reviewing the evaluation, they are prompted to acknowledge completion of their evaluation and submit. This acknowledgement does not indicate agreement with the evaluation narrative or rating and is simply acknowledging the evaluation was reviewed. As an alternative, employees may also select “Request Appeal” by checking the appropriate box which advises the supervisor and the HR Reviewer of the appeal.



11. How does the appeal process work in PerForms?

Appeals are handled outside of PerForms and must follow DHRM policy. Employees must check the box indicating that they wish to appeal the evaluation.

12. Are probationary employees evaluated in PerForms?

No, probationary employees should be evaluated using the Probationary Review forms outside of the automated system.

13. How do we handle employees who are on an extended leave?

Employees who are on leave will review and acknowledge their annual evaluation upon their return to duty. Supervisors should be advised to not “submit” the annual evaluation to the employee until after their return from leave.



HR will need to manually delete those in this status from the aggregate list of all employees in the system. This will prevent those forms being generated by the initiator. If evaluations are created for individuals on extended leave, they should be cancelled by the Initiator or the Agency HR Reviewer. These can be initiated once the employees return from extended leave.

14. Can employees receive a paper copy of their annual evaluation for their records?

Employees can print or download a copy of their annual evaluation.

15. When should supervisors complete and submit the performance plan for the next performance cycle?

Performance plans for FY24-25 will be completed In January 2025. Instructions will be provided at that time as additional changes to the automated processing are forthcoming.

For Additional Questions:

For questions regarding the PerForms access and processes, email the COVApps Team at covapps@vita.virginia.gov

Questions regarding DHRM Policy 1.40, Performance Plan and Evaluation, please contact policy@dhrm.virginia.gov