

A Checklist for Submitting WPM Documentation

** Indicates variations for Library Employees represented by AFSCME 2910

Set Expectations

Assess

Clarify

Document

Monitor

Monitor

Develop

Coach

Performance Plan

Performance Requirements (2910)**

What do I do?

1. Discuss and complete within 30 days of start of appraisal period
2. Check with the Labor Relations Team to see whether there is an obligation to bargain implementation of new/ revised requirements
3. Provide employee with a copy of the plan
4. Retain original working document in SU files
5. Enter the plan into EmpowHR as a *Perf Plan*
6. Upload the scanned OCR PDF into the PM repository following the correct file naming convention (LastnameFirstnameStartMonthYearEndMonthYearPR)

Use Forms*:

- 1726 Performance Plan (2477)
- 1744 Performance Plan (NB/non-S/non-M)
- 1745 Performance Plan (S)
- 1746 Performance Plan (M)

****Written Statement of Performance Requirements (2910)**

Mid-Year Review (MYR)**

What do I do?

1. Discuss and complete MYR within 210 days of the start of the appraisal period
2. Provide employee with a copy of the review
3. Retain original working document in SU files
4. Enter the results of the MYR into EmpowHR as an *Interim Review*
5. Upload the scanned OCR PDF into the PM repository following the correct file naming convention (LastnameFirstnameStartMonthYearEndMonthYearMYR)

Use Form*:

1748 Mid-year Review Checklist (NB/S/M/2477)

****2910: In lieu of MYR, conduct informal performance discussions throughout the appraisal period**

Performance Appraisal **

What do I do?

1. Request list of accomplishments from employee 14-30 days before end of appraisal period (Use: *Writing Individual Performance Accomplishments Job Aid*)
2. Discuss and complete appraisal within 30 days of end of appraisal period, allowing time for employee comment period (5 business days) before deadline
3. Provide employee with a copy of appraisal
4. Retain copy of appraisal in SU files
5. Enter the results of the appraisal into EmpowHR as an *Official Review*
6. Upload the scanned OCR PDF into the PM repository following the correct file naming convention (LastnameFirstnameStartMonthYearEndMonthYearPA)

Use Forms*:

- 1725 Performance Appraisal (2477)
- 1747 Performance Appraisal (NB/S/M)

****110 Performance Rating and Within-Grade Increase Certification (2910)**

Individual Development Plan (IDP)

Individual Training & Development Goals (2910)**

What do I do?

1. Discuss with employee. Have employee complete within 30 days of start of appraisal period
2. Retain original working document in SU files and supervisor and employee should update as needed
3. Provide employee with a copy of the IDP
4. Enter the results of the MYR into EmpowHR as an *IDP*
5. Upload the scanned OCR PDF into the PM repository following the correct file naming convention (LastnameFirstnameStartMonthYearEndMonthYearDD)

Use Form*:

- 173 Individual Development Plan (NB/S/M/2477)

****2910: In lieu of IDP, conduct training and development goals discussions with employee. Document development activities in a memo.**

Review performance requirements and development goals in conjunction with reviews and appraisals. Revise as necessary.

*Forms are available on the WPM website:
<http://www.loc.gov/staff/cld/workforce-performance/index.html>.
 All documents with form numbers are also available on the ISS Forms website:
<http://www.loc.gov/staff/iss/eforms.html>.

Beginning of Cycle

Middle of Cycle

End of Cycle

Due no later than 30 days after the beginning of the appraisal period

Due between 181 and 210 days after the beginning of the appraisal period

Due no later than 30 days after the end of the appraisal period

Provide/Seek Feedback