HR-050-010: Create and Maintain Competency Models

As DHR/Agency, I want to:

1. To be able to run reports off competencies

HR-050-020: Assign Statewide Goals

As DHR/Agency, I want to:

1. To see current and previous statewide goals
2. To be able to update statewide goals
3. To be able to create/enter statewide goals
4. To be able to notify managers/supervisors of statewide goals
5. To be able to cascade goals
6. To designate which goals are for which employee
7. To view which employee goals have been aligned with statewide goals

As Manager/Employee, I want to:

1. To be able to view the statewide goals

As Agency Leadership, I want to:

1. To be able to see current statewide goals

HR-050-030: Assign Agency/Unit Goals

As Agency Goal Updater, I want to:

1. To be able to review the HR knowledgebase to understand how to set agency/unit goals
2. To be able to review agency and statewide goals
3. To be able to develop agency/unit goals
4. To be able to assign agency/unit goals
5. To be able to pull a report on the number of employees assigned to each agency/unit goal
6. To be able to create the agency strategic plan in the system and have that information feed into goals
7. To be able to pull reports on a unit team
8. To be able to set up scoring for the goals
9. To be able to pull a report to view an agency-wide score
10. To be able to edit an agency goal
11. To be able to remove or cancel
12. To dynamically assign goals
13. To be able to lock agency goals so there are no edits
14. To be able to include text that identifies examples of performance levels for each goal
15. To be able to see past goals

HR-050-040: Set Performance and Development Goals

As Manager, I want to:

1. To be able to review the HR knowledgebase to understand how to set goals
2. To be able to review agency/unit goals
3. To be able to review statewide goals
4. To be able to draft individual performance and development goals
5. To be able to finalize individual performance and development goals
6. To be able to edit individual performance and development goals
7. To be able to add a multi-year goal (i.e. underfill plan) and tie it to a later goal date
8. To be able to attach documentation
9. To modify a finalized goal
10. To be able to approve/align on the employee's behalf
11. To be able to see what other systems are affected if I edit a goal
12. To be able to see all progress if I am a new supervisor to the employee
13. To create different templates for performance and development goals
14. To see the employee and position's history of goals
15. To be able to lock a goal so the employee cannot edit it
16. To be able to see higher tier goal edits dynamically in aligned goals
17. To be able add comments to goals
18. To be able to export/print goals
19. To be able to route goals to their manager or HR for input/comments/feedback
20. To be able to add attachments to goals
21. To be able to have goal status options
22. To be able to categorize goals and define impact to overall evaluation rating (performance vs development)
23. To be able to run reports on goal categories
24. To receive notifications of upcoming goal due dates

As DHR/Agency, I want to:

1. To be able to run reports on goal categories (all goal data)

As Employee, I want to:

1. To be able to align on individual performance and development goals
2. To be able to add comments to my goals
3. To be able to suggest/create my own performance and development goals
4. To be able to edit goals
5. To be able to export/print goals
6. To be able to add attachments to goals
7. To receive notifications of upcoming goal due dates

HR-050-050: Create and Maintain Employee Goals & Talent Profiles

As Employee, I want to:

1. To be able to review the HR knowledgebase to understand the goals and talent profile
2. To be able to review my goals and talent profile
3. To be able to update goal progress

4. To be able to update my skills and qualifications
5. To be able to update my competencies
6. To be able to submit my changes
7. To be able to upload documentation
8. To be able to review my goal progress if my supervisor updates the progress
9. To receive notifications when my skills are validated
10. To receive notifications when my goals are updated
11. To be able to request a goal to be cancelled or changed

As DHR/Agency/Manager, I want to:

1. To be able to review the HR knowledgebase to understand the goals and talent profile
2. To be able to review my employee's goals and talent profile
3. To be able to update my employee's goals based on progress
4. To be notified when my employee updates their goal progress
5. To be able to finalize my employee's goals
6. To be able to validate my employee's skills/qualifications
7. To be able to view documentation uploaded by my employee
8. To be able to attach documentation
9. To be able to update employee's goal progress
10. To be able to cancel a goal
11. To be able to hide raw scores
12. To be able to edit finalized goals

HR-050-060: Conduct Ongoing and Frequent Feedback

As Employee, I want to:

1. To able to update talent profile and goals based on check-in
2. To review talent profile and career development plan

As a Manager +1, I want to:

1. To be able to see the employee records that my employee supervises
2. To be able to edit goals
3. To be able to view team's goals (direct reports and indirect reports)

As a Manager, I want to:

1. To able to update talent profile and goals based on check-in
2. To review talent profile and career development plan
3. To attach relevant documentation if applicable
4. To be able to delegate and notify a proxy
5. To be able to view team's goals (direct reports and indirect reports)
6. To create a note

As DHR/Agency, I want to:

1. To be able to delegate and notify a proxy

2. To be able to view documentation that was uploaded
3. To be able to see goals set by managers (to run a report of goals based on manager)
4. To be able to view and edit supervisor notes

HR-050-070: Complete 360 Feedback

As Employee, I want to:

1. To be able to complete a 360 feedback for themselves
2. To be able to review feedback
3. To be able to acknowledge receipt of feedback
4. To be able to review past 360 feedback
5. To be able to request 360 feedback
6. To request feedback participants

As Manager, I want to:

1. To be able to edit/redact or summarize feedback to share with an employee
2. To be able to close the 360 feedback by a certain date and manage late responses as needed
3. To be able to close out 360 feedback even if employee does not acknowledge receipt
4. To be able to send 360 feedback to outside entities not in the state's Infor system
5. To compare 360 feedback by position/unit/manager
6. To be able to see and categorize who submitted comments
7. To be able to launch the 360 feedback form and select the participants
8. To update development goals based on feedback
9. To be able to create/select a customized template
10. To manually add feedback received outside of the 360 feedback

As DHR Agency/Manager +1, I want to:

1. To be able to view 360 feedback for an employee
2. To be able to create a customized template
3. Configure a notification to feedback explaining anonymity expectations

As Feedback Participants, I want to:

1. To be able to receive a link to complete feedback
2. To complete and submit feedback
3. To receive a notification reminding me to complete the feedback
4. To be able to deny a feedback request

HR-050-080: Conduct Performance Evaluation

As Employee Evaluation Approver, I want to:

1. To provide comments or feedback or edits needed to manager
2. To be able to approve or return an evaluation
3. To see the audit trail

As Employee, I want to:

1. To leave comments on my finalized evaluation
2. To sign or refuse to sign an evaluation
3. To add attachments to an evaluation
4. To be able to receive and review an evaluation
5. To be able to see prior evaluations (from other agencies and after separation)
6. To receive notifications when evaluations are assigned to them
7. To complete a self-evaluation
8. To print an evaluation

As Manager, I want to:

1. To attach documents to an evaluation
2. To allow peer managers to add/edit/finalize evaluations
3. To be able to finalize evaluation after the employee's review
4. To copy and paste text into an evaluation
5. To utilize spell check and have work autosaved
6. To add comments to evaluation if edits made after approval
7. To be able to review our dashboard for upcoming evaluations
8. To receive notification of evaluations due soon
9. To be able to start an evaluation
10. To submit an evaluation for approval
11. To share evaluation with employee
12. To receive a notification that the employee refused to sign
13. To print an evaluation

As Manager +1, I want to:

1. To see upcoming evaluations that are due
2. To see evaluation status by manager

As DHR/Agency, I want to:

1. To finalize evaluation without employee
2. To hide raw evaluation scores from employees
3. To require evaluations with particular ratings to go to HR or other appropriate stakeholders first
4. To access all evaluations and be a part of the approval process if necessary
5. To see audit trail
6. To see evaluation status by manager
7. To edit or modify evaluations
8. To pull reports on evaluation data
9. To be able to return a finalized evaluation back to draft status
10. To assign the evaluation to a different reviewer
11. To finalize evaluations without review process
12. To be able to delete evaluations
13. To be able to see upcoming evaluations
14. To be able to see all previous/current evaluations for all State of Idaho employees