Toronto and Region Conservation Authority (TRCA)

Employee Training Aid – Dayforce Performance

January 2023

Purpose of Employee Training Aid

This training aid will help you understand features of **Dayforce Performance** module that will use as an employee in updating your performance review items for TRCA's Performance process, including:

1. Recording entries to your Performance screens, such as creating for **Goals/Objectives,** and **Development Plans**.

2. Completing you **Review Form**, such as inputting comments and ratings.

3. **Approval Process** for review forms.

Contents

Dayforce Performance

Dayforce Performance is designed to support Toronto and Region Conservation Authority ("TRCA") in its Performance Development process. It includes features to help employees and managers with:

- Goal/Objective Setting
- Competency Development
- Performance and Career Development Planning

TRCA Performance

TRCA's Performance Program is based on open and ongoing dialogue, feedback, and support throughout an employee's career. Key foundational pillars of the program include:

- Operationalizing employee work activities through Goals/Objectives that are aligned to TRCA's Strategic Pillars and Strategic Outcomes.
- Formalized Competencies to align individual behavior and actions with TRCA's Core Behaviours.
- Career and Development Planning with the primary purpose of improving employee job performance and supporting employees to reach short and long-term career development goals.

Directional Resources and Related Documents

TRCA's Performance Development Program incorporates elements that are aligned with TRCAs underlying governing mandates and operational objectives.

TRCA Mission, Vision, Core Values and Core Behaviours

Located on TRCA's public website under **About TRCA** webpage, TRCA's Core Behaviours are incorporated in TRCA's Performance Program and translate to competencies expected of all employees.

| Link to:	**TRCA Mission, Vision, Core Values and Core Behaviours**
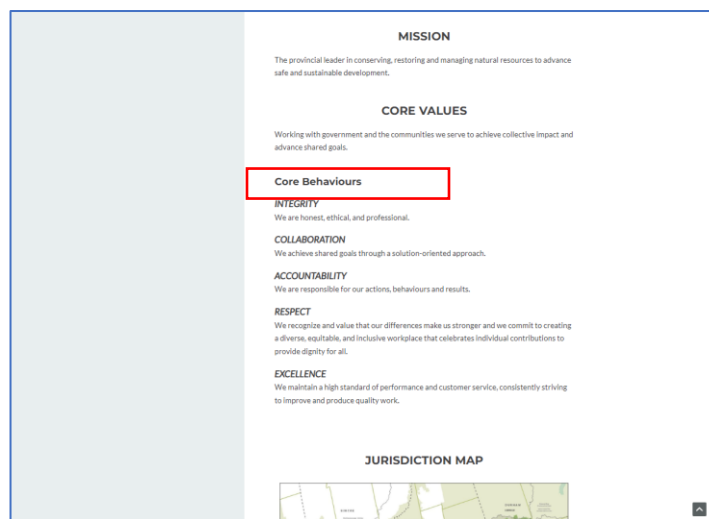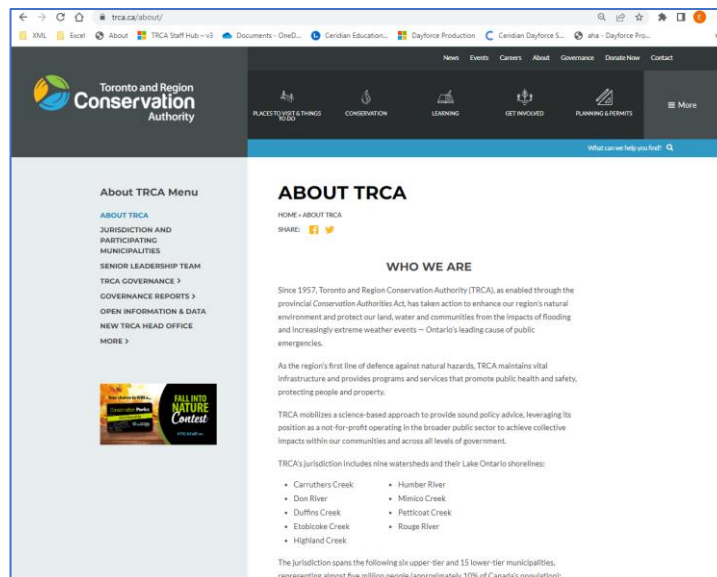
Core Behaviours: Competencies

TRCA's Performance Development Program encompasses formalized Competencies to align individual behavior and actions with TRCA's Core Behaviours.

A detailed outline of Core Behaviours is located on the **Staff Hub** under **Human Resources** > **Performance Development Resources**.

Link to:	Staff Hub > Human Resources
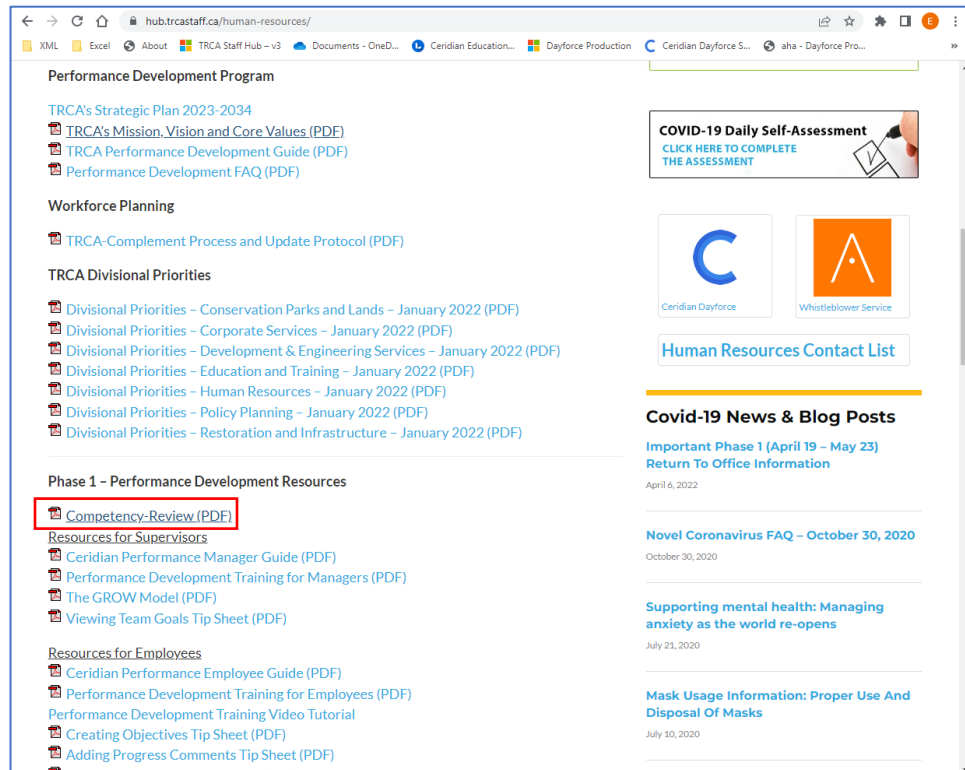
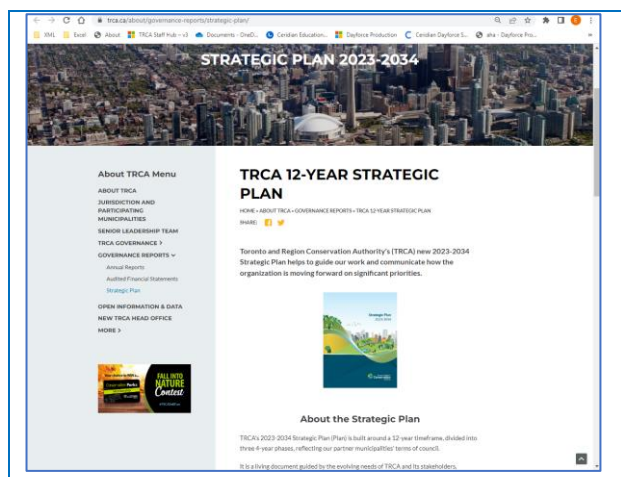## TRCA Strategic Plan 2023-2034 and TRCA Strategic Pillars

Located on TRCA's public website under **About TRCA** > **Governance Reports** webpage. There is also a link to download a PDF file version of the TRCA 2023-2034 Strategic Plan. The plan is also included on the **Strategic Business Planning and Performance** webpage.

It is a living document that guides TRCA towards its desired outcomes. A new plan starting in 2023, it orients around four strategic pillars and 12 strategic outcomes. The four pillars are included in TRCA's Performance Program as Goal Categories that must be set for every goal recorded. Core Behaviours are also listed in TRCA's Strategic Plan.

A summarized version of The Strategic Pillars and Strategic Outcomes is also included on the **Staff Hub** website under **CEO Update** in a November 2022 update.

Link to:	Strategic Plan 2023-2034	TRCA Strategic Pillars
Link to:	Strategic Business Planning and Performance	

TRCAStratPlan2023-2034-FA.pdf

Business Unit Alignment

A Business Unit Alignment Chart that cross references how your division and business unit goals align with the Strategic Plan Pillars and Outcomes.

Located on the Staff Hub website under a January 10, 2023, **CEO Update**.

Link to:	Located on the **Staff Hub** website under a January 10, 2023, **CEO Update** webpage.
	Welcoming 2023 - Business Unit Alignment
Link to:	Located on the **Strategic Business Planning and Performance** webpage.
	Strategic Business Planning and Performance
	• Business Unit Alignment Chart
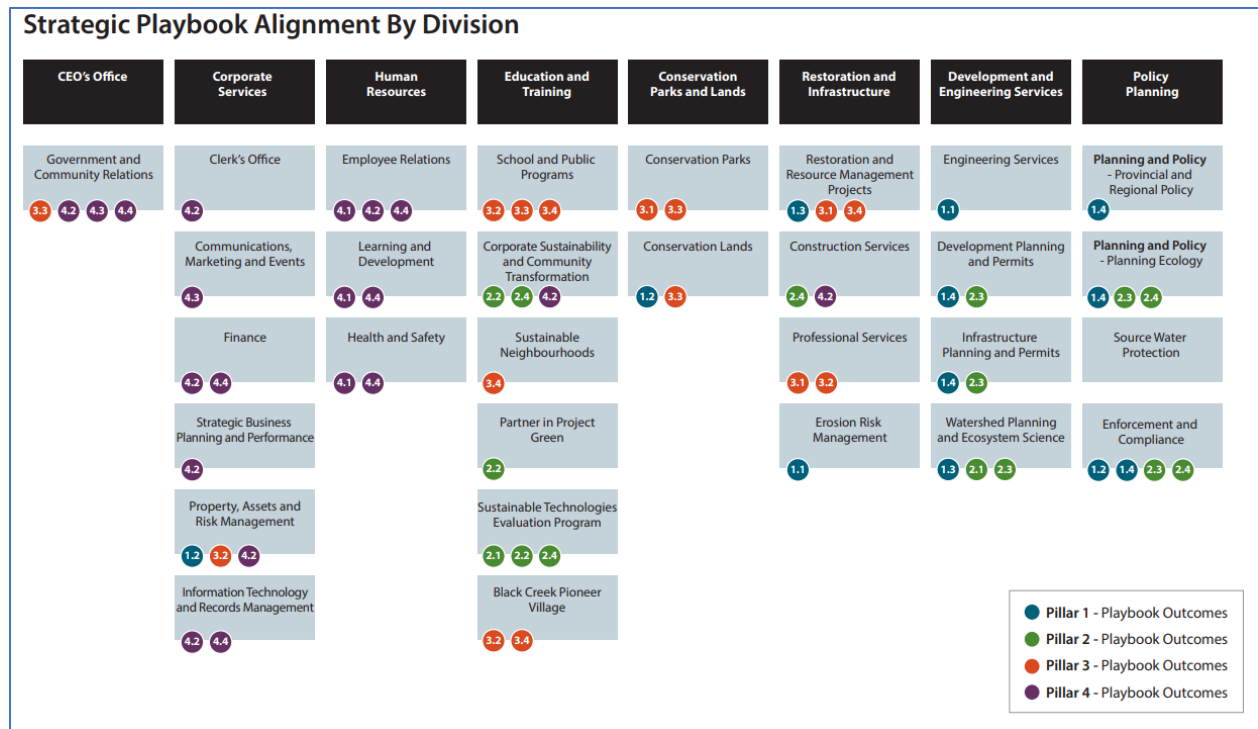
Playbook

The Playbook is TRCA's living implementation plan. It operationalizes a 12-year plan into shorter, four-year phases. The Playbook is organized by Pillars and Outcomes and should inform annual business unit planning as well as performance development program objective setting. The Playbook will be updated regularly and is available on the dedicated Staff Hub SBPP hub space page.

| Link to:	Located on the **Staff Hub** website under a January 10, 2023, **CEO Update** webpage.
	Welcoming 2023 - Playbook
Link to:	Located on the **Strategic Business Planning and Performance** webpage.
	Strategic Business Planning and Performance
	• Playbook (Excel)

PDF versions of the Paybook specific to your division are also available.

Located on the **Strategic Business Planning and Performance** webpage.

Link to:	Government and Community Services
Link to:	Corporate Services
Link to:	Human Resources
Link to:	Conservation Parks and Lands
Link to:	Restoration and Infrastructure
Link to:	Development and Engineering Services
Link to:	Policy Planning
Link to:	Education and Training

Launching Ceridian Dayforce

You can launch **Dayforce** by clicking on the **Dayforce** link on TRCA's Staff Hub.
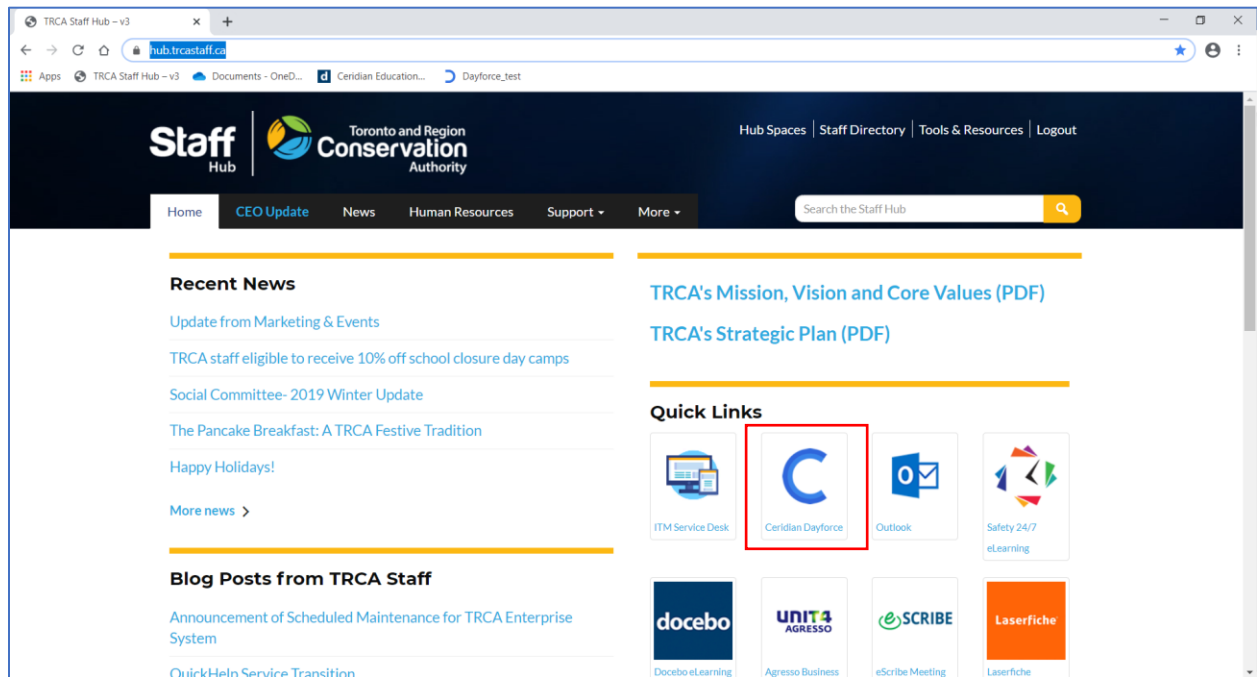
You can also copy and paste the link below into your browser's address bar.
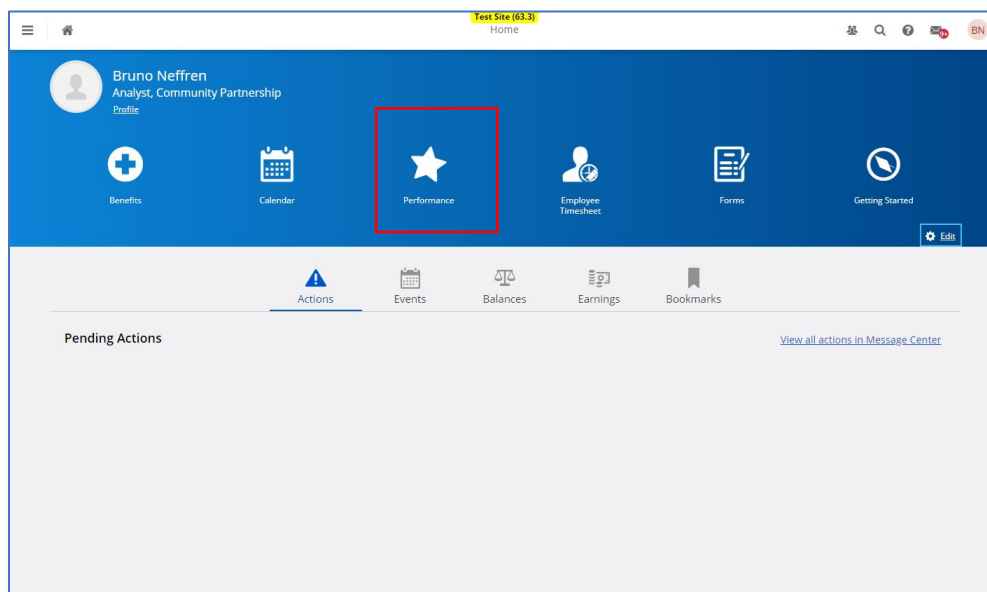
- **http://dayforce.trcastaff.ca/**
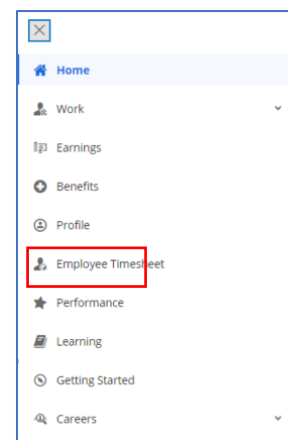
Employee – Time Entry Login Role

To record and update your personal performance items such as goal/objective details, ratings and performance comments, you log in under the **Employee – Time Entry** role.
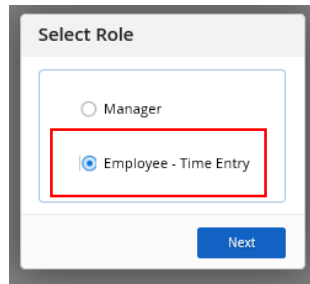
Dayforce then opens with the **Home** screen displayed. Click the **Performance** icon on the Home screen to access **Dayforce Performance**.

If the icon is not on your screen, click the Menu button (⊟) at the top left-hand corner of the screen and select **Performance** from the menu to access **Dayforce Performance.**

Dayforce Performance Screens

When you access the Dayforce Performance module under your **Employee – Time Entry** user role, the module includes the following screens. Each screen is a tab.

Overview	This screen displays a summary of your **Performance** items
Goals	You record your **Goals/Objectives.**
Competencies	Lists the **Competencies** that are assigned to you.
Reviews	Includes **Review** forms that are assigned to you. You use these forms to record your comments and ratings.
Development Plans	You record Development Plans, for example to track career development and performance improvement.

Overview Screen

The **Overview** screen is the first screen that displays by default. This screen displays a summary of your **Performance** items. It consists of several panes that summarize your **Review Cycles**, **Goals, Competencies** and **Development Plans**.

You can click the **tab** hyperlinks to display the related screens.
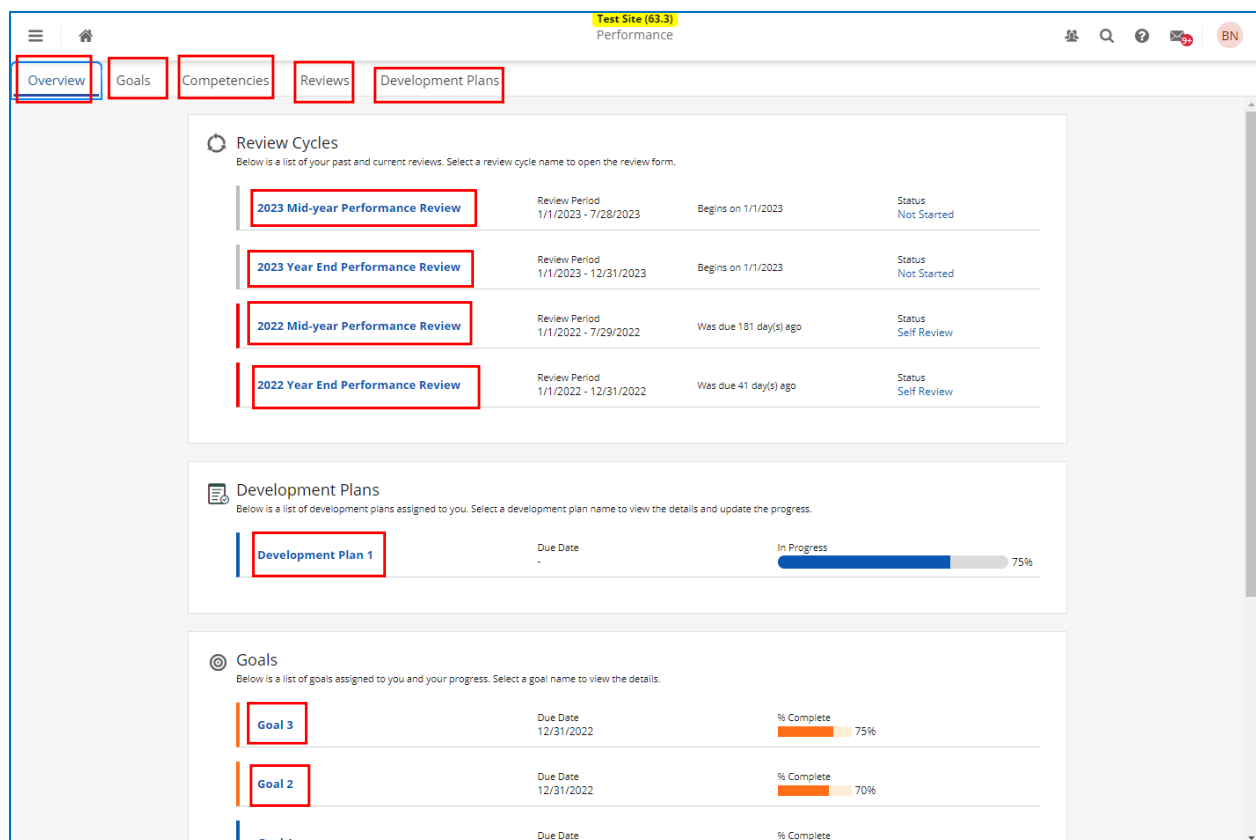
You can also click links in the panes to access those specific items in the related screen.

Goals / Objectives

The **Goals** screen is where you record details for your goals / objectives.

To access the **Goals** screen, click on the Goals button in the ribbon.

When you access your goals, the **My Goals** screen displays by default to display your published goals.

(Draft Goals are ones that you are "drafting" but haven't published or shared. This will be explained in a section further below.)
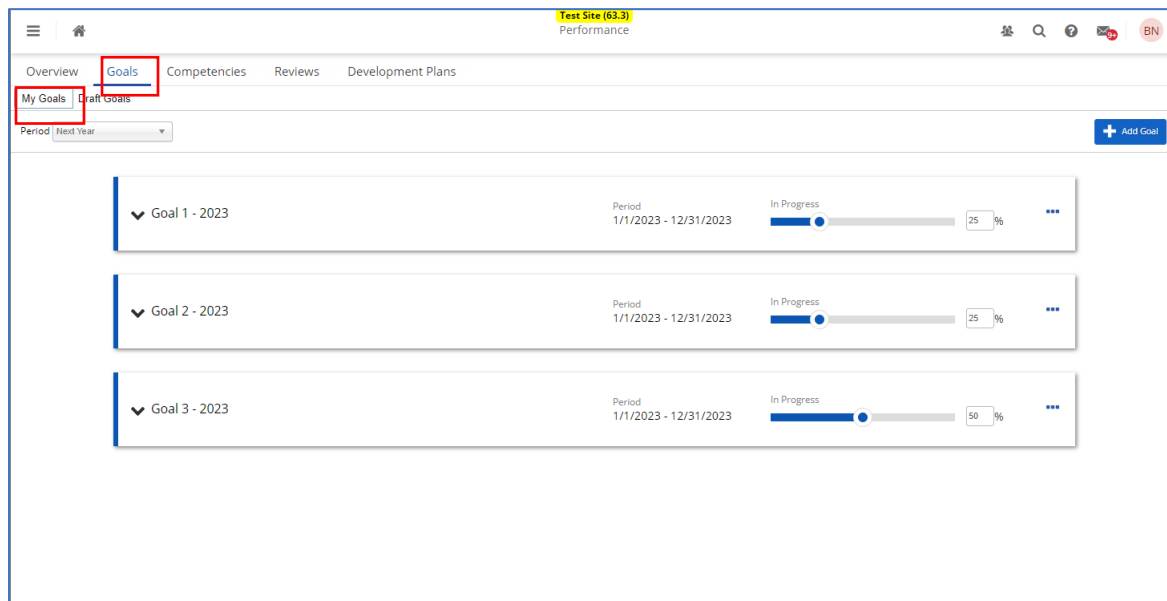
Goals – Period list

You select a value in the **Period** list to filter your goals by year based on the Goal Start Date (i.e., 'Previous Year', 'Current Year', 'Next year', 'Future Periods').
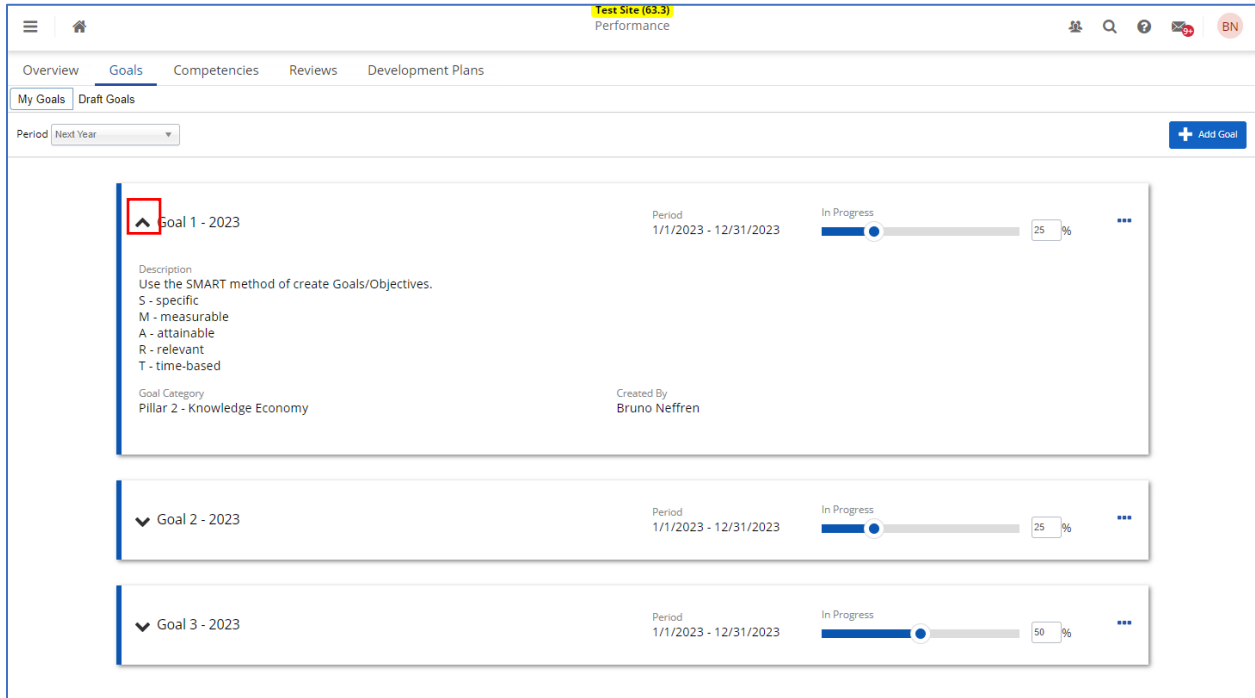
Draft Goals

Draft Goals are ones that you are "drafting" and "Save as Draft' but haven't published or shared yet. There is a separate screen to track these. Click the **Draft Goals** button to display any you might have. After you publish them, they display in the **My Goals** screen.
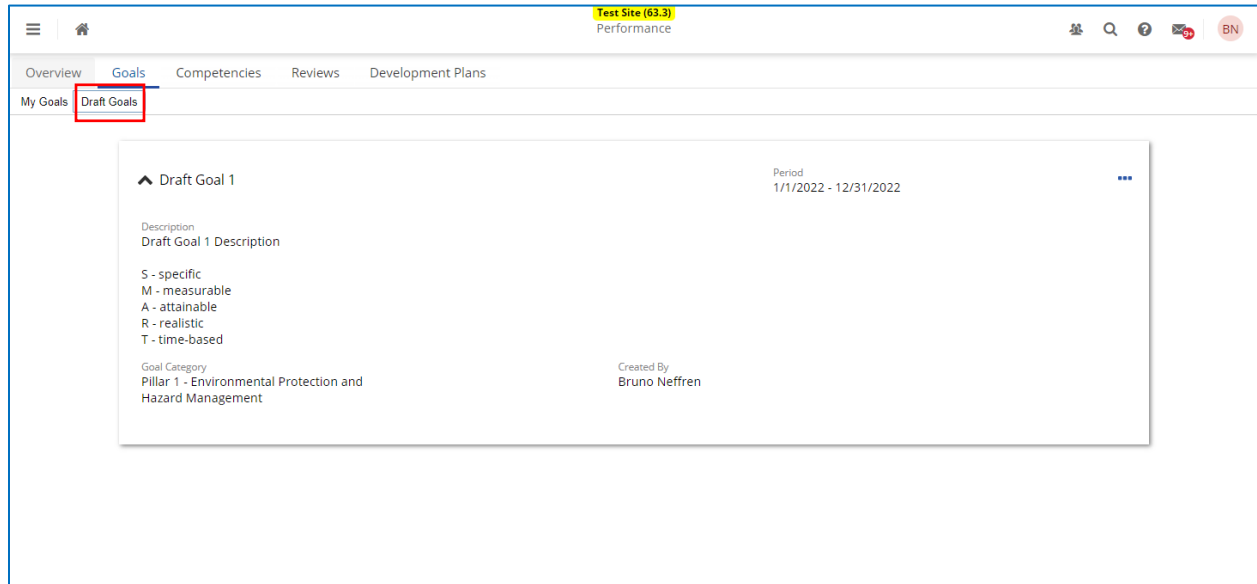
TRCA Performance

Displaying Goal Details

You display details of a goal by clicking the arrow next to the **Name** of the goal.

Recording / Adding a Goal

1. Click on the [+ Add Goal] icon located at the top right corner of **My Goals** screen
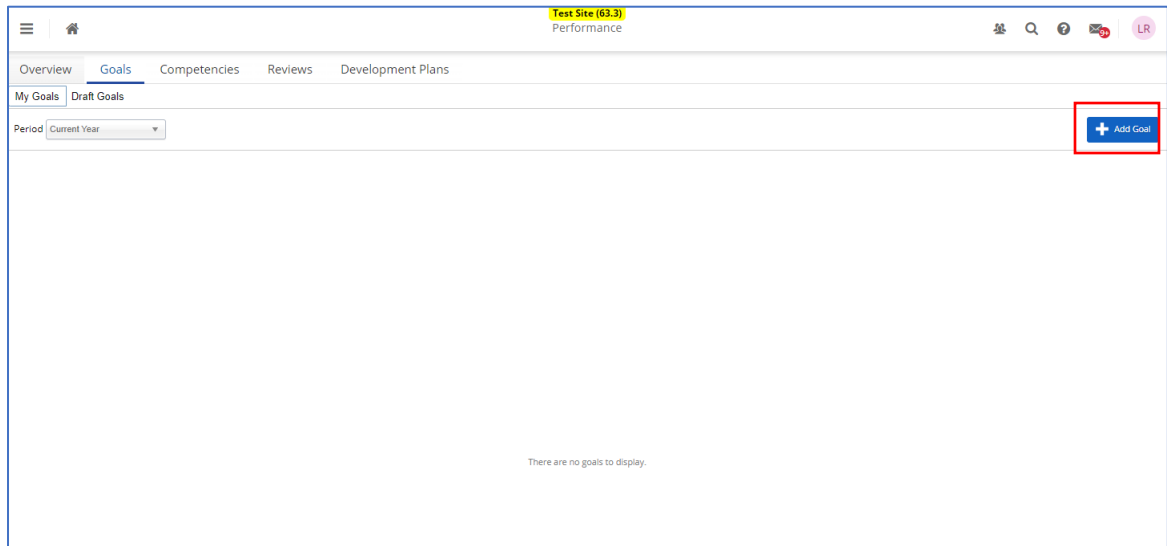
2. The **Add Goal** screen box displays.

3. Record the goal name in the **Name** field.

4. Record the description of the goal in the **Description** field. Follow the **SMART** method of establishing goals/objectives.

5. Enter the Goal **Start Date** and **Due Date** for the current performance year (e.g., Jan 1 – Dec 31.)

6. Record the **Goal Category** for your goal.
   - Goal to be aligned to any of TRCA's four 'Strategic Pillars' or 'Divisional Objective'.
   - A maximum of five total goals are to be recorded per year.

Goal Category *

Select an Option... ▲!

🔍

Divisional Objective

Pillar 1 - Environmental Protection and Hazard Mana

Pillar 2 - Knowledge Economy

Pillar 3 - Community Prosperity

Pillar 4 - Service Excellence

7. Select and record a value for **Measure Type** for your Goal/Objective.
   - Select either: **Percentage** or **Actual / Target** as the type of measurement.

Measure Type *

Select an Option... ▲

🔍

Percentage

Actual / Target

If **Actual / Target** is selected for **Measure Type**, then two additional fields appear:

• **Target Type**   • **Target**

Measure Type *

Actual / Target ▼

Goal progression percentage is calculated as the actual value divided by the target value. The actual value is entered by the individuals that are assigned to the goal.

Target Type *
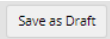
Select an Option... ▼
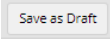
Target *

   - If 'Actual / Target' is selected, you must record either **Amount ($)** or **Count** for Target Type.

- Then enter a **Target** (amount).

8. Click [✓ Finish] at the bottom right hand corner of the screen to save as an active Goal/Objective.

9. If you click [Save as Draft] the goal is part of your **Draft Goals** and won't be included in any Review forms. Clicking [✓ Finish] "**publishes**" the goal, they are part of **My Goals**.

Note: If you want to keep the goal in 'Draft' status (i.e., keep it still recorded in the 'Draft Goals' screen), don't click [✓ Finish] - that will always publish and share your goals – rather, click [Save as Draft] ("Save as Draft") again and again for as long as you want them as draft goals.

Goal Start Date and Due Date – Best Practice

Ensure that both the 'Goal Start Date' and the 'Due Date' you record fall in the same calendar year.

Even if the same goal spans multiple years, you must ensure the previous entry has a Due Date equal to 'December 31, 20XX' and that a new entry for the goal be recorded for the following year accordingly.

Dayforce Performance does allow you to record dates for a goal to span more than one year, but there is a small chance your review form will not pick up the goal when this is the case.

Best practice is that the 'Goal Start Date' and 'Due Date' recorded fall in the same calendar year.

Edit Goal

To edit a goal, click on the ellipsis **⋯** button for the goal, select **Edit**.

Continue to edit the details consistent with the steps described above.

Goal Progress

You update the **Progress** for your goal by moving the Progress slider, or, by entering a value in the associated box.

The slider and value are connected – update either and the other one updates accordingly.

When the review form displays the goal, it will also display the related progress.

Goal Status

Dayforce automatically displays the progress *status* for each goal by using a colour-coded bar on the left edge of the Goal panel.
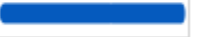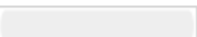
Gray: Not Started. The goal is 0% completed.

Green: Completed. The goal is 100% completed.

Blue: In Progress. The goal is on track to be completed by the due date.

Red: Overdue. The goal has passed the due date and is not completed.

Orange: At Risk. The goal progress is 10% or more behind the expected progress, calculated by an algorithm that projects progress based on Start Date and the Due Date.

At Risk	The goal progress is 10% or more behind the expected progress.	
Overdue	The goal has passed the due date and is not completed.	
In Progress	The goal is on track to be completed by the due date.	
Not Started	The goal is 0% completed.	
Completed	The goal is 100% completed.	
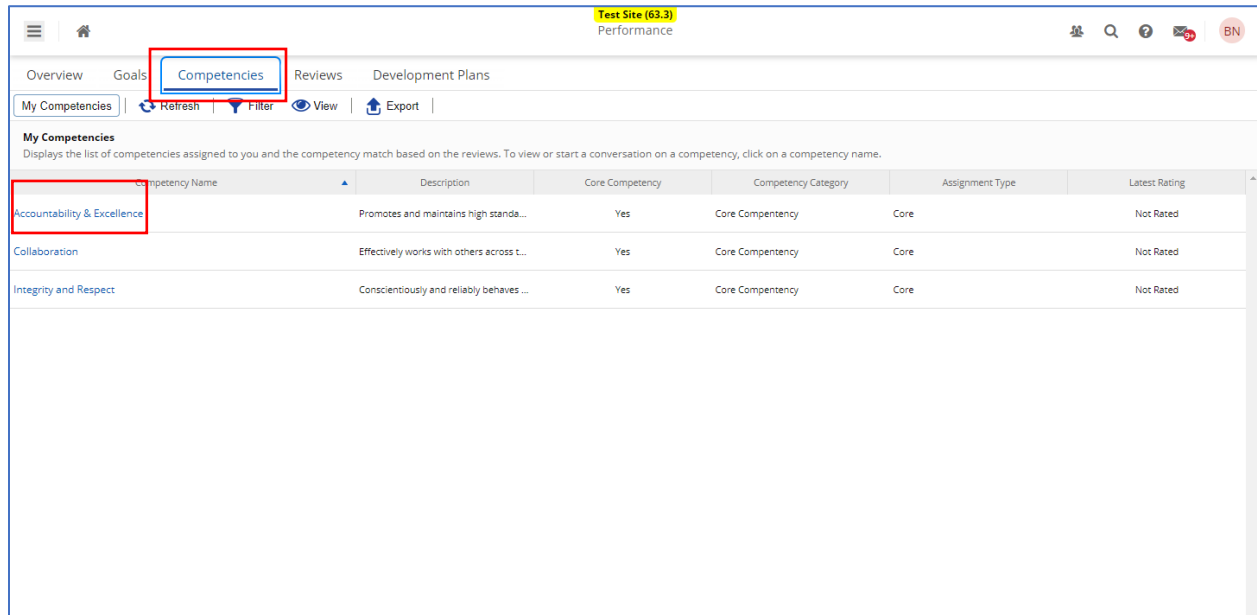
Competencies Screen

Click on the [Competencies] button to display the **Competencies** screen. It displays competencies that are assigned to you.

Click on a competency to display additional details and expected behaviours. (Click *'...view more/...view less'*).

Competency Assignment Matrix

Competencies are assigned by **Competency Type**, as follows.

Competency Type	Assignment		
	All Employees	**Managers**	**Senior Leadership**
Core	✓		
Leadership	✓	✓	
Senior Leadership	✓	✓	✓

Development Plans

Click on the [Development Plans] button to display the **Development Plans** screen. This screen is used to manage career development. Development Plans are set up for various reasons, for example to track and manage career planning or to improve performance.
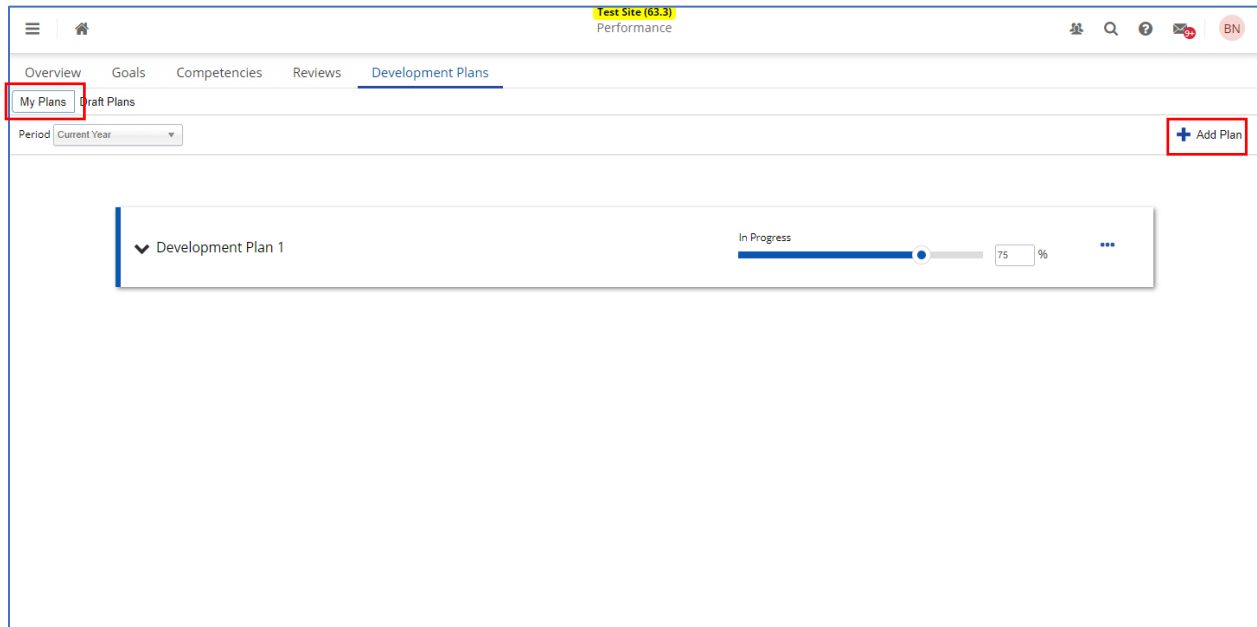
To create a plan, click on the [+ Add Plan] icon located on the **My Plans** screen.

The **Add Plan** pop-up box displays.

- Record the **Name** and **Description** of the plan.

- Click the drop-down to record a value for **Purpose**.

- Record **Purpose Description**.

- Enter the **Plan Start Date** and **Due Date** for the current performance year (e.g., Jan 1 – Dec 31.)

- Click **Next**. The **Activities** tab will display, as per below.

Please note – **Activities** are optional and do not need to be recorded.

- Click the [+ Add] button to record any **Activity** to support the plan

- Record **Name**, **Due Date** and **Description**.

- Click **Finish** to save.

Reviews Screen

Click on the [Reviews] button to display the **Reviews** screen. This screen list performance review forms that are assigned to you. You record comments and ratings for your goals and competencies in these forms.

You also record comments for your development plans in these forms.

Click on the **Review Form Name** to make it display. It displays as shown below.

Review Form Sections

The **Review Form** is where you enter comments and ratings for your performance. Your manager will also record comments and ratings for your performance.

Your manager accesses your form under their login.

The form consists of up to four sections.

Goals Evaluation	Includes the goals you created in the **Goals** screen.
Competency Evaluation	Includes the competencies assigned to you in the **Competency** screen.
Career and Development Planning	Includes custom questions set by the Human Resources to collect supplementary information.
Development Plan Evaluation	Includes development goals you created in the **Development Goals** screen.

View More / View Less

When a **Review Form** is opened there are sections and sub-sections that can be expanded or collapsed by clicking on ' *..view more'* or '*…view less'.*

Mid-year Review Form

The **Mid-year Review Form** includes three sections.

Goal Evaluation	Includes the goals you created in the **Goals** screen.
Competency Evaluation	Includes the competencies assigned to you in the **Competency** screen.
Development Plan Evaluation	Includes the development plans you created in the **Development Plans** screen

Goals Evaluation

As part of the **Mid-year** review form, you are required to provide comments on how you are progressing with your goals. Ratings are not part of the Mid-year review form.

To record your comments in the form:

1. Click on the **Comments** field to add your comments.

2. Use the scroll bar to navigate to other **Comment** fields to enter additional information for other goals.

3. To save, click **Save as Draft**.

4. Click arrow at top left corner of screen to exit the review form.

Competency Evaluation

As part of the **Mid-year** review form, you are required to provide comments on how you are progressing with your competencies. Ratings are not part of the Mid-year review form.

To record your comments in the form:

1. Click the two ' *..view more'* links to view the i) description of the competency, ii) the associated behaviours.

2. Click on the **Comments** field to add your comments.

3. Use the scroll bar to navigate to other **Comment** fields to enter additional information for other competencies.

4. To save, click **Save as Draft**.

5. Click arrow at top left corner of screen to exit the review form.

Development Plans Evaluation

As part of the **Mid-year** review form, you are required to provide comments on how you are progressing with your development plans.

To record your comments in the form:

1. Click on the **Comments** field to add your comments.

2. Use the scroll bar to navigate to other **Comment** fields to enter additional information for any other development plans.

3. To save, click **Save as Draft**.

4. Click arrow at top left corner of screen to exit the review form.

Mid-year Review – Form Routing Process

There is no approval with the **Mid-year** review form. The form is routed to statuses as follows:

Mid-year Review	1. Self-Review
	2. Manager Review
	3. Employee Signature
	4. Manager Signature

Preview/Submit

When you are completed making updates to your review form, you are required to **Submit** it to your manager for review.

1. As you complete your review form, it is in 'Self Review' status.

2. When you are ready to submit, click the **Preview** button at the bottom of the form.

The **Preview** screen displays your review form in a different layout, but it consists of everything just as you recorded.

1. Click the **Submit** button.

Manager Review

After you submit your review form to your manager, its status changes from **Self Review** to **Manager Review**.

Under this status you cannot record any further updates – the form is locked.

Reopen

If necessary, if you want to make changes to what you recorded (or if your manager wants you to), your manager has the option to **Reopen** your review form. This means you are given the opportunity to make changes to the comments and ratings you recorded and then **Submit** it all over again.

Employee Signature

When your manager completes and submits your Mid-year review form, its status changes to **Employee Signature**.

Under this status, the comments your manager recorded in your review form are now visible to you.

At this point you are required to provide your sign-off.

1. Access and display your Review Form. Scroll down to the bottom.
2. Check the '**I Agree'** box.
3. Enter any **Comments**.
4. Click **Complete Review**.

Year-end Review Form

The **Year-end Review Form** includes four sections.

Goal Evaluation	Includes the goals created in the **Goals** screen.
Competency Evaluation	Includes the competencies assigned to you in the **Competency** screen.
Career and Development Planning	Includes custom questions set by Human Resources to collect supplementary information.
Development Plan Evaluation	Includes development goals you created in the **Development Plans** screen.

Performance Evaluation Rating Matrix

The header for the review form contains the **Evaluation Rating Matrix**. Click ' *..view more'* if this header collapsed.

You refer to this to help gage the ratings you record for your performance.

Goals Evaluation

As part of the **Year-end** review form, in addition to comments, you are required to provide ratings on how you are progressing in your goals**.**

To record your comments and ratings in the form:

1. Click on the **Comments** field to add your comments.

2. Record a **Rating** for performance by clicking / dragging the slider on the scale.

3. Use the scroll bar to navigate to other **Comment** fields and **Rating** scales to enter additional information for other goals.

4. To save, click **Save as Draft**.

5. Click arrow at top left corner of screen to exit the review form.

Competency Evaluation – Year End

As part of the Performance Review cycle for **Year-end**, in addition to comments, you are also required to provide ratings on how you are progressing in your competencies.

To record your comments and ratings in the form:

1. Click on the **Comments** field to add your comments.

2. Record a **Rating** for performance by clicking / dragging the slider on the scale.

3. Use the scroll bar to navigate to other **Comment** fields and **Rating** scales to enter additional information for other **Competencies**.

4. To save, click **Save as Draft**.

5. Click arrow at top left corner of screen to exit the **Review Form**.

Career and Development Planning

As part of the Performance Review cycle for **Year-end** you are required to provide comments on **Career and Development Planning** - **Additional Questions**.

The questions are text based. Record your comments.

To record your comments in the form:

1. Click on the **Comments** field to add your comments.

2. Use the scroll bar to navigate to other **Comment** fields to enter additional information for other additional questions.

3. To save, click **Save as Draft**.

4. Click arrow at top left corner of screen to exit the **Review Form**.

Development Plans

As part of the review cycle for **Year-end**, you are required to provide comments on how you are progressing with your development plans.

To record your comments in the form:

1. Click on the **Comments** field to add your comments.

2. Use the scroll bar to navigate to other **Comment** fields to enter additional information for any other development plans.

3. To save, click **Save as Draft**.

4. Click arrow at top left corner of screen to exit the review form.

Year-end Review – Approval Process

The steps and related approval in the process are as follows:

Year End Performance Review	1. Self Review
	2. Manager Review
	3. Human Resources Approval (Pending Approval)
	4. Employee Signature
	5. Manager Signature

Employee Action – Same as Mid-year

You take the same steps for approval under **Year-end** review form as you do under **Mid-year** review**.**

The no apparent difference in the process for you. The only difference is that **Human Resources Approval** is slotted in between **Manager Review** and **Employee Signature**. After Human Resources approves the review, it will be routed to you for signature.