



South Carolina Department of Motor Vehicles

EMPLOYEE PERFORMANCE MANAGEMENT SYSTEM

HR-204B
(Rev. 11/15)

Name: Courtney White Employee ID #: _____

Division: Operations Office / Unit: Field Services

Position Classification: Deputy Director

Date Assigned to Current Position (MM-DD-YY): 12 - 08 - 17

Performance Review From (MM-DD-YY): 11 - 17 - 17 To: 05 - 16 - 18

TYPE OF EVALUATION (Please check one): ☐ Universal/Annual ☐ Short Year/Universal ☒ Trial Period
☐ Probationary ☐ Substandard Performance ☐ Special/Close-Out

PLANNING STAGE ACKNOWLEDGEMENT

Signature/ Rating Officer: _____ Date: - -

Print Name: John F. Laganelli Phone #: (803) 896 - 9010

Signature/ Reviewed by: _____ Date: - -

Print Name: Kevin A. Shwedo Phone #: (803) 896 - 8925

Signature/ Employee: [Signature] Date: 5 - -

Print Name: Courtney White

(Signature of employee indicates the Planning Stage and Position Description were reviewed with the employee.)

Check if applicable: ☐ Planning stage was not completed at the beginning of the rating period. This is to acknowledge that both the employee and rating officer agree that the duties and success criteria by which the rating will be done is acceptable.

EVALUATION STAGE ACKNOWLEDGEMENT

Signature/ Rating Officer: [Signature] Date: 5 - 7 - 18

Print Name: John F. Laganelli Phone #: () -

Signature/ Reviewed by: [Signature] Date: - -

Print Name: Kevin A. Shwedo Phone #: () -

Reviewing Officer Comments: _____

Signature/ Employee: [Signature] Date: 5 . 7 - 18

Print Name: Courtney White

(My signature indicates that I was given the opportunity to discuss the official performance review with my supervisor – not that I necessarily agree.)

Employee Comments: _____

APPRAISAL RESULTS (Total)

2.55

Total is to be placed here before submitting to Human Resources but **AFTER** meeting with employee.



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Success Criteria: •Assists other areas within the agency with training needs •Ensures training coordinator schedules and tracks training course for all field personnel specific to their job duties (Examiner, CDL, Class D, Manager Training, Q-flow) •Ensures that training classes are scheduled and delivered to promote state-wide uniformity.	<input checked="" type="checkbox"/> Yes or <input type="checkbox"/> No	10	S
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7. Job Duty: Other duties as may be required.	Essential	Weight Factor	Performance Level
Success Criteria:	<input checked="" type="checkbox"/> Yes or <input type="checkbox"/> No	5	S

8. Job Duty:	Essential	Weight Factor	Performance Level
Success Criteria:	<input type="checkbox"/> Yes or <input type="checkbox"/> No		

ACTUAL PERFORMANCE

Please provide a brief description of the employee's actual performance during this rating period. Please be specific and use examples of work performed, where appropriate. Exceptional job leading the Field Services Department through several transitions; hired and integrated two Regional Managers, and numerous Branch Office Managers. Reorganized the regions in conjunction with Regional Manager changes. Led Field Services through peak season while implementing Real ID integration across 67 Branch Offices and despite increased transactions and significant personnel turmoil, maintained acceptable wait times with limited exceptions. Integrated Real ID temporary employees, relief CSRs, and expanded weekend office hours with exceptional results. Exercised significant personal effort into branch office relocation activities; completed one office renovation and is working the procurement and integration planning for two additional offices. Routinely provides exceptional input and insight into policy and procedural modification for the betterment of the agency. A very solid start over this trial period.

OBJECTIVES

(Optional)

Each job duty should be identified as being essential or not by selecting Yes or No.

An essential objective is defined as a non-recurring task or assignment, which has primary importance to the total position.

1. Objective:	Essential	Weight Factor	Performance Level
Success Criteria:	<input type="checkbox"/> Yes or <input type="checkbox"/> No		

2. Objective:	Essential	Weight Factor	Performance Level
Success Criteria:	<input type="checkbox"/> Yes or <input type="checkbox"/> No		

3. Objective:	Essential	Weight Factor	Performance Level
Success Criteria:	<input type="checkbox"/> Yes or <input type="checkbox"/> No		

4. Objective:	Essential	Weight Factor	Performance Level
Success Criteria:	<input type="checkbox"/> Yes or <input type="checkbox"/> No		

5. Objective:	Essential	Weight Factor	Performance Level
Success Criteria:	<input type="checkbox"/> Yes or <input type="checkbox"/> No		



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ACTUAL PERFORMANCE

Please provide a brief description of the employee's actual performance during this rating period. Please be specific and use examples of work performed, where appropriate.

PERFORMANCE CHARACTERISTICS/COMPETENCIES

- See [EPMS Performance Characteristics/Competencies](#)
- See [EMPS Competency Dictionary](#)

1. Characteristic/Competency:	Weight Factor	Performance Level
Success Criteria:		
2. Characteristic/Competency:	Weight Factor	Performance Level
Success Criteria:		
3. Characteristic/Competency:	Weight Factor	Performance Level
Success Criteria:		

SUMMARY AND IMPROVEMENT PLAN

Identify the employee's major accomplishments, area needing improvement, and steps to improve present and future performance:

APPRAISAL RESULTS

☒ Exceptional

☐ Successful

☐ Unsuccessful



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HR-204B
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INFORMATION SHEET

Definitions of Types of Evaluations:

- **Universal / Annual Evaluation:** An EPMS review on a covered State employee who has been with SCDMV a minimum of one year. SCDMV has established a universal review date of February 17th; meaning all Universal/Annual reports will cover the period of February 17th of one year until February 16th of the next year. The rater (supervisor) may complete the employee's EPMS evaluation up to 90 days prior to the annual performance review date which does not change the annual performance review date.
- **Short-Year Evaluation:** A short year review is a performance appraisal that evaluates an employee's performance for a period of time less than 12 months in order to phase the employee onto the universal review date. A Short-Year appraisal shall be used to bridge a time period greater than three months between completion of a Probationary, Trial, or Close-out evaluation and the universal review date. Note: For any report falling in the period from November 17th to February 16th under the universal review date, supervisors should instead use the Form HR-204D Short Year Performance Review Check Off.
- **Probationary Evaluation:** An EPMS review for employees new to State service upon completion of their initial 12-month test period. The performance review period for a probationary employee begins the first day of employment and ends the day before their annual review date. An employee's probationary period cannot extend beyond 12 months. Following completion of a Probationary EPMS, the employee's next evaluation will be either a Short-Year EPMS or a Short Year Performance Review Check Off.
- **Trial Period Evaluation:** An EPMS review covering the initial working test period of six months immediately following a covered employee's promotion, reclassification, demotion, or reassignment. An employee's trial period may be extended for up to 90 calendar days upon written notification to the employee prior to the end of the six month trial period. If an employee does not successfully complete the trial period, the agency must remove the employee from the position by demoting, reclassifying, or reassigning the employee back to their previous position or a position equal to the old position. Following completion of a Trial Period EPMS, the employee's next evaluation will be either a Short-Year EPMS or a Short Year Performance Review Check Off.
- **Special / Close-out Evaluation:** An EPMS review provided whenever a covered employee is reassigned within SCDMV or when there is a change in the employee's supervisor. This report is only required whenever it has been more than 90 days since the employee's last evaluation. The purpose of this report is to ensure large periods of performance time are properly documented. Following completion of a Special / Close-out EPMS, the employee's next evaluation will be either a Short-Year EPMS or a Short-Year Performance Review Check Off.
- **Substandard Performance Evaluation:** An EPMS review administered to an employee who has received a *Warning of Substandard Performance* (Form HR-204C) and failed to make improvements. By the end of the warning period, if the employee is rated "unsuccessful" on any essential job function or objective which significantly impacts performance as noted in the "Warning Notice of Substandard Performance", the employee shall be removed from the position immediately (i.e. terminated, reassigned, demoted). The "Warning Notice of Substandard Performance" must provide for an improvement period of no less than 30 calendar days and no more than 120 calendar days.

The Planning Stage: The supervisor should meet with the employee to discuss the position description and how it relates to the job duties and objectives for the upcoming year. After this discussion, the supervisor shall complete the Planning Stage of the document. The supervisor is to send **all pages** of the completed Planning Stage (HR-204B) to Human Resources.

Prior to discussing the completed Planning Stage with the employee, the supervisor will present the final document to the reviewing officer for signature. The supervisor will then meet with the employee to review the final plans for the year and obtain the employee's signature. The completed planning document will be maintained by the agency to be used as the evaluation document at the end of the review period. The planning



South Carolina Department of Motor Vehicles

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HR-204B
(Rev. 11/15)

document will be revised during the review period if there are significant changes that impact the employees overall performance.

- **Job Duties:** The supervisor, considering suggestions from the employee, shall select job duties from the employee's most recent position description and develop success criteria for each duty.
- **Objectives:** This section allows the supervisor to include any additional special projects or program assignments that are not on the position description but that are assigned to the employee during the rating period. Objectives are optional, but if used, success criteria are required for each objective.
- **Performance Characteristics/Competencies:** Performance characteristics/competencies and their definitions should be directly related to the employee's job and may be selected by the supervisor and the employee from a list developed by the Office of Human Resources. All management and supervisory employees are required to be reviewed on "promoting equal opportunity." Success criteria shall be developed for each performance characteristic/competency.

NOTE: Objectives and performance characteristics/competencies may not exceed a combined weight factor of 25%.

The Evaluation Stage: The supervisor will complete the Evaluation Stage (HR-204B) based on the employee's performance for the entire year. Using the three levels of performance outlined below, job duties, objectives, and performance characteristics/competencies shall be rated on how well the employee has met the success criteria as outlined in the planning stage.

Once the supervisor has completed the evaluation document, it will be presented to the reviewing officer for signature. The supervisor will then schedule a meeting with the employee to discuss his/her performance and to obtain the employee's signature on the evaluation document. The employee is to complete and sign Form HR-209A Employee Acknowledgment of Duty of Non-Disclosure and Due Diligence. The supervisor is to sign the employee's HR-209A form as a witness and send it with **all pages** of the signed and completed Evaluation Stage (HR-204B) and EPMS Work Form (HR-204A) to Human Resources. The evaluation must be completed prior to the review date to be timely.

Three Levels of Performance

- **Exceptional Performance Requirements:** Work that is above the success criteria for the job. Employees are performing above the job expectations and rarely need direction or supervision.
- **Successful Performance Requirements:** Work that meets the success criteria for the job. Employees are doing everything that the supervisor asks them to do, such as completing work on time.
- **Unsuccessful Performance Requirements:** Work that fails to meet the success criteria of the job.

Appraisal Results: Exceptional | Successful | Unsuccessful



South Carolina Department of Motor Vehicles
EPMS WEIGHTED SYSTEM - WORK FORM

HR-204A
(Rev. 11/15)

DUTIES:

Courtney White

Duty	Weight Factor	Performance %	Rating Level	Value	=	Total Score
Duty 1	25	%	E	3	=	75
Duty 2	20	%	S	2	=	40
Duty 3	15	%	E	3	=	45
Duty 4	15	%	E	3	=	45
Duty 5	10	%	S	2	=	20
Duty 6	10	%	S	2	=	20
Duty 7	5	%	S	2	=	10
Duty 8		%	Select One	0	=	0
Duty 9		%	Select One	0	=	0
Duty 10		%	Select One	0	=	0

OBJECTIVES:

Duty	Weight Factor	Performance %	Rating Level	Value	=	Total Score
Objective 1		%	Select One	0	=	0
Objective 2		%	Select One	0	=	0
Objective 3		%	Select One	0	=	0

PERFORMANCE CHARACTERISTICS/COMPETENCIES:

Duty	Weight Factor	Performance %	Rating Level	Value	=	Total Score
Characteristic/Competency 1		%	Select One	0	=	0
Characteristic/Competency 2		%	Select One	0	=	0
Characteristic/Competency 3		%	Select One	0	=	0

TOTALS	100	%				255
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OVERALL RATING: 2.55

PERFORMANCE REQUIREMENT RATING: **EXCEPTIONAL**

