A. SUPERVISOR CREATES NEW PERFORMANCE APPRAISAL FOR EMPLOYEE

Creating a New Appraisal

HR -> People -> Employees -> My Employees -> Actions -> Create New Appraisal

Contact your HR Consultant if you do not see all of your full-time employees listed on the My Employees page.

1. Click on the People menu in the main directory and then click the Employees menu.
2. Click the My Employees menu item.
3. The following page will default to the performance activity for your employees.
4. Hover-over the Action(s) menu located to the right in the Employee Badge and click the Create New Appraisal option.
5. Select the appropriate appraisal workflow from the Launch From Workflow Template drop-down menu.
6. Click the Preview button and then the Launch Previewed Appraisals button.
7. The newly created appraisal will display on the following screen. You may now continue to Step B: Planning/Performance Phase.

B. PLANNING/PERFORMANCE PHASE: SUPERVISOR ENTERS GOALS AND ACHIEVEMENTS

Adding Goals

1. Access the employee’s appraisal and click the Employee Goals tab.
2. Scroll down and enter the goal in the Employee Goal field, Description (if applicable) and the Target Date.
3. Click the Save button at the bottom of the screen.
4. The newly created goal will appear directly below Employee Goals tab.
5. Repeat steps 2 - 4 to add additional goals.

NOTE: Goals added during this step are for the current year only and should have been identified and discussed with the employee throughout the review period (Aug-May). If goals were not identified with the employee during that time frame, leave the Goals tab blank.

Adding Achievements

1. Access the employee’s appraisal and click the Achievements tab.
2. Scroll down and enter the Achievement and Description (if applicable).
3. Click the Add button.
4. The newly added Achievement will appear directly below Achievements tab.
5. Repeat steps 2 - 4 to add additional entries.

NOTE: After the supervisor has entered Goals and Achievements in the Planning/Performance phase, s/he must advance the performance appraisal to the Assessment phase by performing the steps below.

Advancing Appraisal to the Assessment Phase

1. If you are still in the Employee’s Performance Appraisal, click on the Signatures tab, and then on the “Move employee to next status” icon.
2. Otherwise, click on the People menu in the main directory and then click the Employees menu.
3. Click the My Employees menu item.
4. Click the ‘Expand’ link located to the right in the Employee Badge.
5. Next, click the Assessment phase displayed as a hyperlink located below the appraisal in the Current Appraisal section.

Viewing Appraisals from Prior Years

If you would like to review past appraisals on any of your employees, go to: HR -> People -> Employees -> My Employees. Click on the Expand link on bottom right corner of the employee’s badge and then click on the Past Appraisal(s) link. To view appraisals completed prior to 2010-2011, contact HR.

Access/Go Back to Existing Employee Appraisal

HR -> People -> Employees -> My Employees -> Appraisals

1. Click on the People menu in the main directory and then click the Employees menu.
2. Click the My Employees menu item.
3. Click the appropriate Appraisal Name displayed as a hyperlink in the Appraisals column for the employee.
C. ASSESSMENT PHASE: SUPERVISOR EVALUATES EMPLOYEE

Completing the Assessment/Evaluation

1. Access the employee’s appraisal and review the on-screen instructions for the Assessment phase.
2. Click on one of tabs (Employee Goals, Staff Performance Indicators, Staff Supervisor Performance Indicators, or Disciplinary Actions) within the performance appraisal.
3. Click the Score or Rate Indicator button located next to the Performance Indicator.
4. Select a Rating from the rating scale provided.
5. Enter Comments in the text box provided.
   The supervisor MUST enter comments for a rating of “1–Does Not Meet Expectations” or “3–Exceeds Expectations.
6. Repeat steps 2 - 5 for ALL performance indicators within EACH tab.
   If employee does not have supervisory responsibilities, select the rating of “Not Applicable” for ALL Staff Supervisor Performance Indicators. If employee does not have Level I or Level II Disciplinary Action, select “Not Applicable” for this performance indicator.
7. Click the Overall Assessment tab.
8. Click the Submit Assessment button to submit your assessment as final.
   If the Submit Assessment button is not displayed, you have missed rating one or more of the performance indicators. Return to each tab to complete any performance indicators that were not scored.
9. Click the Go Back link to: a) Override the system calculated rating or b) enter final comments in the Manager Comments box, and perform the following tasks:
   • To override the system calculated rating, mark the Manager Override box. Select the alternative rating, add your reasons for the override, and click the Submit button.
   • Enter final comments in the Manager Comments box and click the Submit button.

NOTE: Clicking on Submit at this step only submits the assessment scores as complete; it will NOT yet submit the assessment to the employee for review.

NOTE: After the supervisor has completed and submitted the assessment, the supervisor should print the performance appraisal and schedule a meeting with the employee to discuss the performance appraisal.

Printing the Appraisal

1. Hover-over the People menu in the main directory and then click the Employees menu.
2. Click the My Employees menu item.
3. Click the ‘Expand’ link located to the right in the Employee Badge.
4. Hover-over the Action(s) menu located on the right of the Current Appraisal section and select Print from the drop-down menu that appears.
5. Make sure “ALL” is selected in the “View Journal Entries by Who Can View Them” box so that all supervisor comments will be displayed and click Go.
6. Hover over the (Employee Name) Appraisal title and select Download as PDF from the drop-down menu that appears.
7. Open the PDF document and select File and then Print to select the appropriate printer and print the appraisal.

At the meeting with the employee, the supervisor should provide the employee with a copy of the performance appraisal and review the document with the employee.

AFTER the supervisor has met with the employee to review the Performance Appraisal, the supervisor must advance the Performance Appraisal to the Review phase where the supervisor will electronically sign the Performance Appraisal, which automatically sends it to the employee for signature. To do so, see next instructions at the top of the next column.

Advancing the Appraisal to the Review Phase

1. Hover-over the People menu in the main directory and then click the Employees menu.
2. Click the My Employees menu item.
3. Click the ‘Expand’ link located to the right in the Employee Badge.
4. Next, click the Review phase displayed as a hyperlink located below the appraisal in the Current Appraisal section.
   • Alternatively, you may click the ⬅️ icon found under the last tab of the appraisal to advance to the next phase.

Moving Appraisal to the Previous or Next Phase

1. Hover-over the People menu in the main directory and then click the Employees menu.
2. Click the My Employees menu item.
3. Click the ‘Expand’ link located to the right in the Employee Badge.
4. The Current Appraisal section will display the various appraisal phases. The current phase will be listed in black text with no hyperlink. You may toggle between previous or next phases by clicking on the appropriate hyperlink for the phase you wish to access (Planning/Performance, Assessment or Review).
   You must advance the appraisal to the Review Phase again in order to sign the appraisal and submit it to the employee for his/her signature and comments.

D. REVIEW PHASE: SUPERVISOR SIGNS PERFORMANCE APPRAISAL AND SENDS TO EMPLOYEE FOR SIGNATURE

Signing the Appraisal

1. Access the employee’s appraisal and click the Overall Assessment tab.
2. Enter your regular Novell Username and Password (not your entire email address) in the fields provided.
3. Enter any Signature Comments, as desired.
4. Click the Submit Signature button.

After the supervisor has electronically signed the Performance Appraisal, it will automatically be sent to the employee for comments and signature.

E. EMPLOYEE ADDS COMMENTS AND ELECTRONICALLY SIGNS APPRAISAL

AFTER the manager electronically signs the appraisal, the employee will receive an email informing him/her that a Performance Appraisal is awaiting his/her review and electronic signature along with instructions.

The supervisor should return to the appraisal after the employee has signed it to see if the employee submitted any comments that need to be addressed. To view employee signature comments, you MUST follow the same ‘Printing the Appraisal’ steps you completed in the Assessment Phase.

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