Step-by-Step Guide to Online Performance Management Tool for Employees

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Introduction to Performance Management

The Performance Management Cycle consists of the following steps:

1. Starting your performance review
2. Documenting and completing your Mid-Year review
3. Self-Evaluation and Year-end review
4. Providing Upward Feedback

This document will cover the steps needed to complete a new performance management cycle.

For questions or concerns please contact Learning and Organizational Development at x77844.

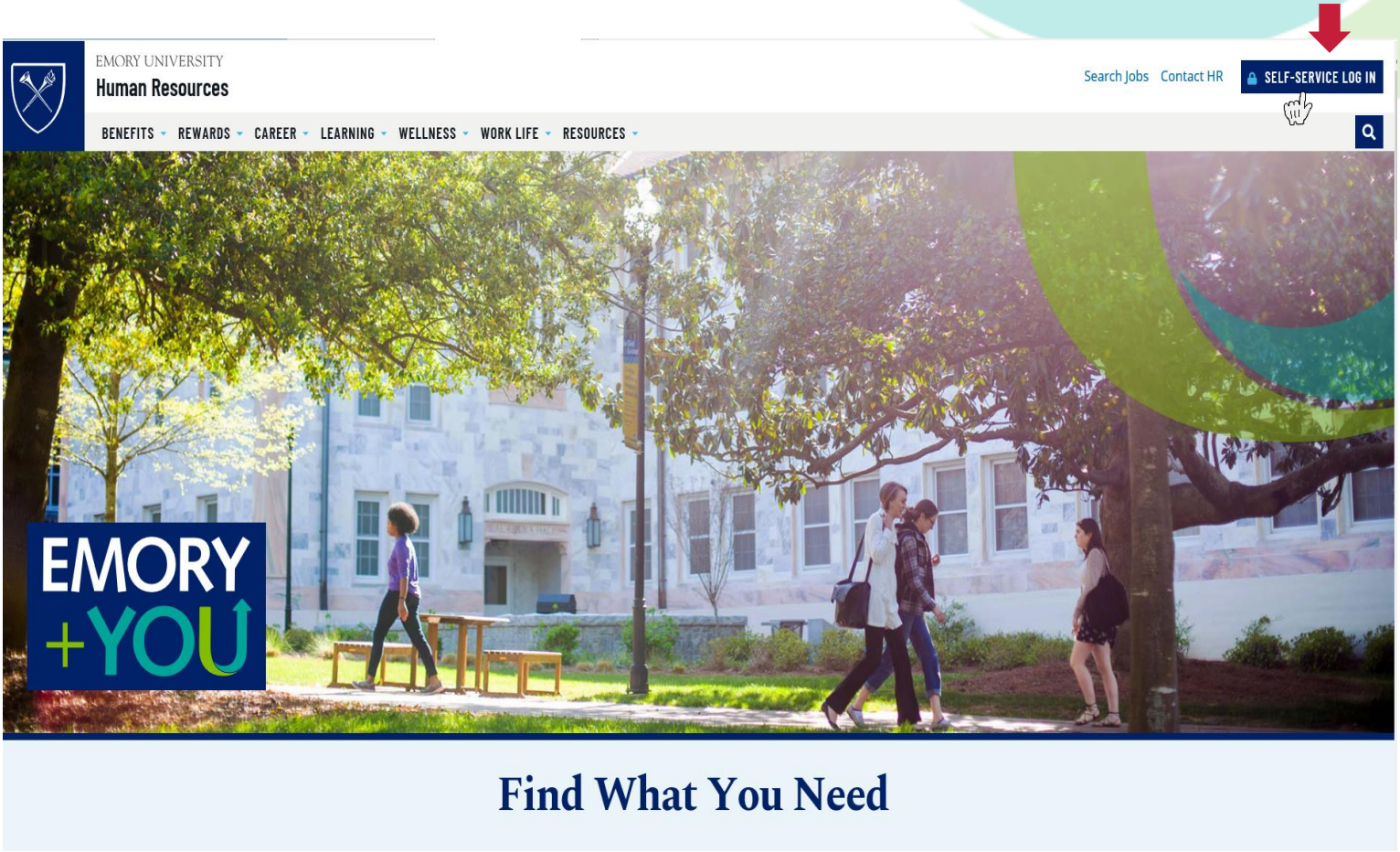
Performance Management User Guide

Employee (Non-Manager) Edition: Starting your New Performance Management Cycle

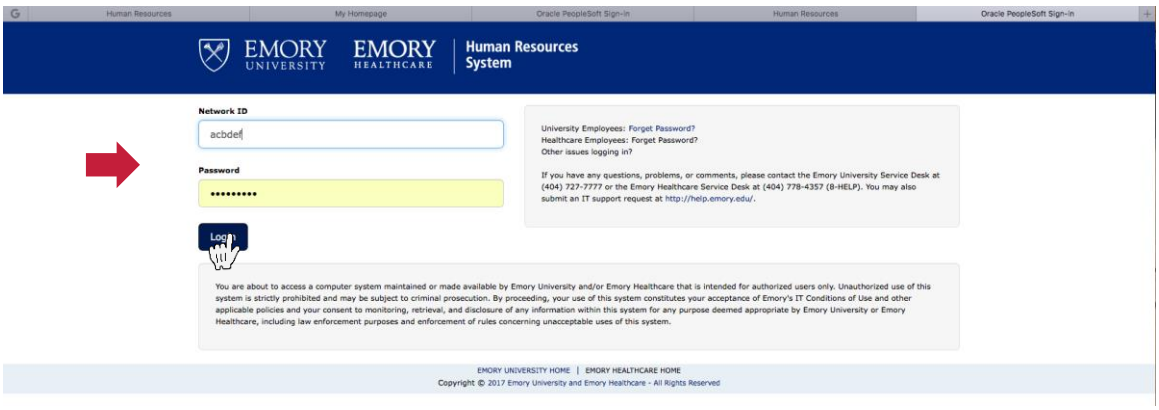
The first step of the performance management process in PeopleSoft 9.2 is called the "Start" step. Here you will add your own goals, new competencies and additional responsibilities for use in driving feedback and evaluation throughout the year. This is an opportunity for you and your manager to determine what criteria should be included in the Mid-Year and End-of-Year review.

For questions or concerns please contact Learning and Organizational Development at x77844.

1) Begin by going to the Human Resources page (www.hr.emory.edu) and selecting “Self-Service Login."

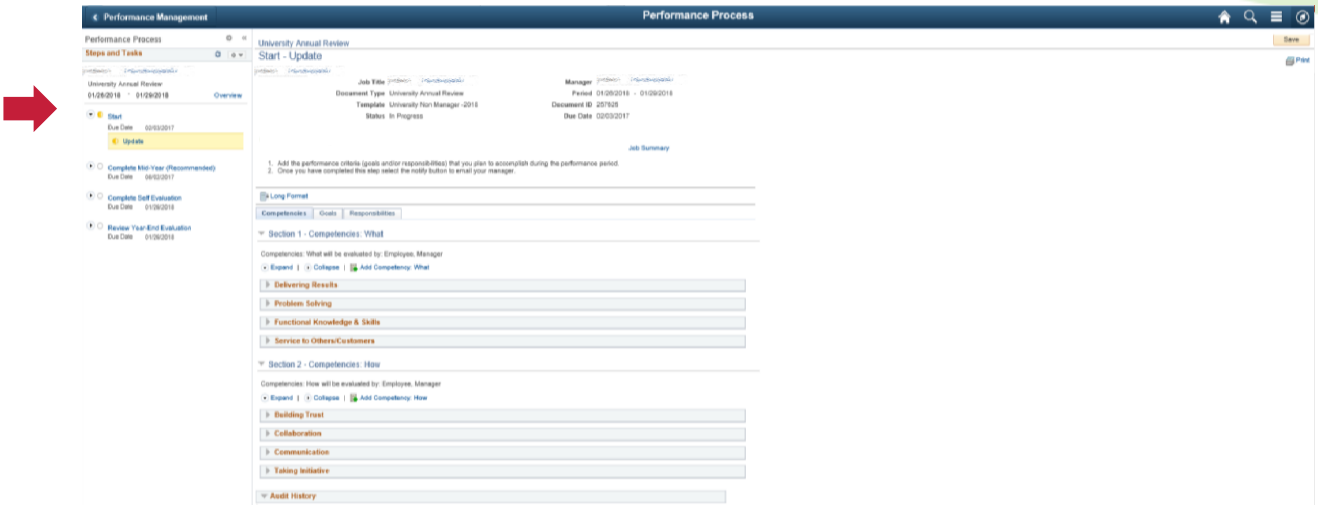


2) Type in your user name (Network ID) and password.

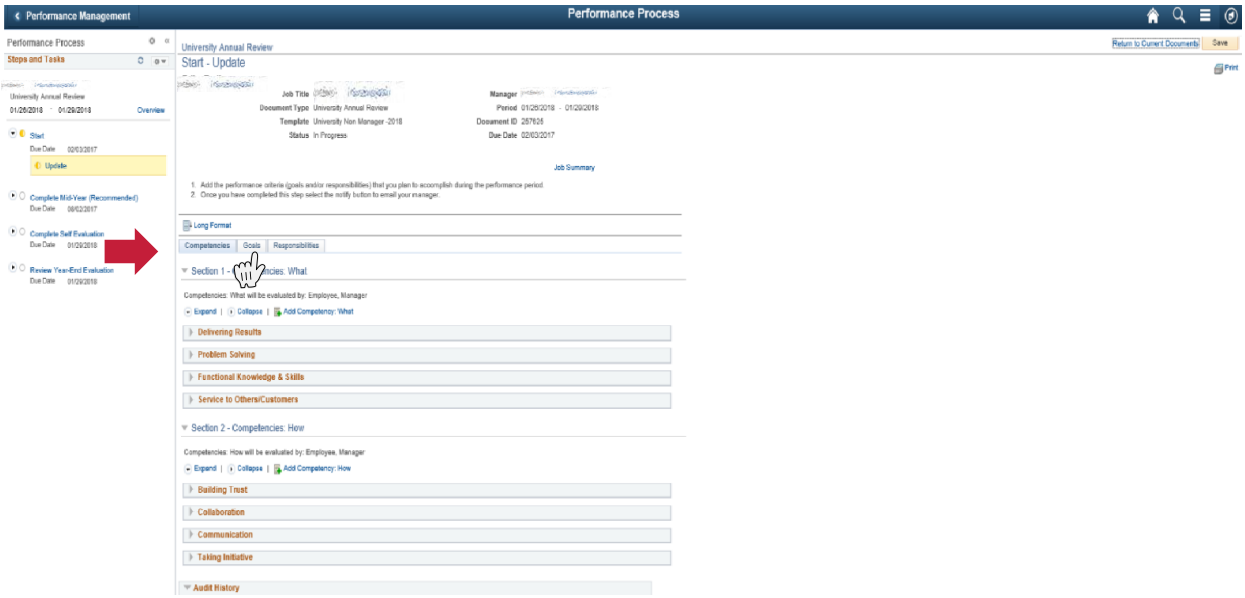


3) Once you are in Self- Service, select the “Performance Management” tile.

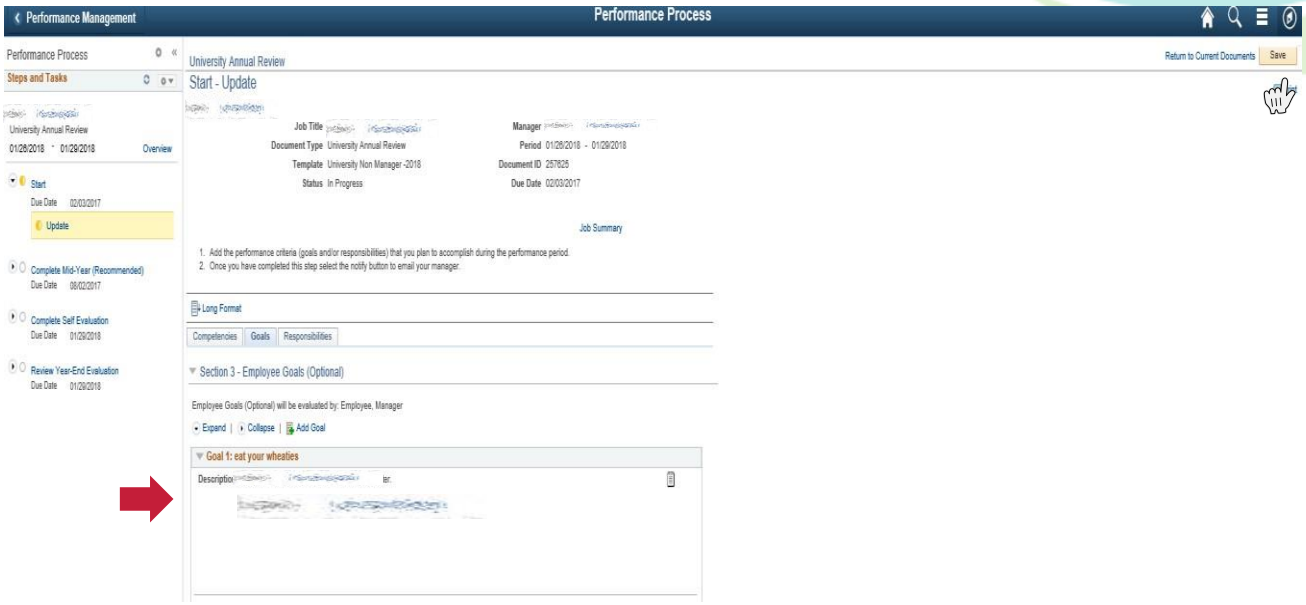
4) Here you will see the main screen of your performance document. You can navigate the main section of each stage (Start, Update, Mid-Year Review, Self-Evaluation, and Year-End Review) using the tabs for Competencies, Goals, and Responsibilities.



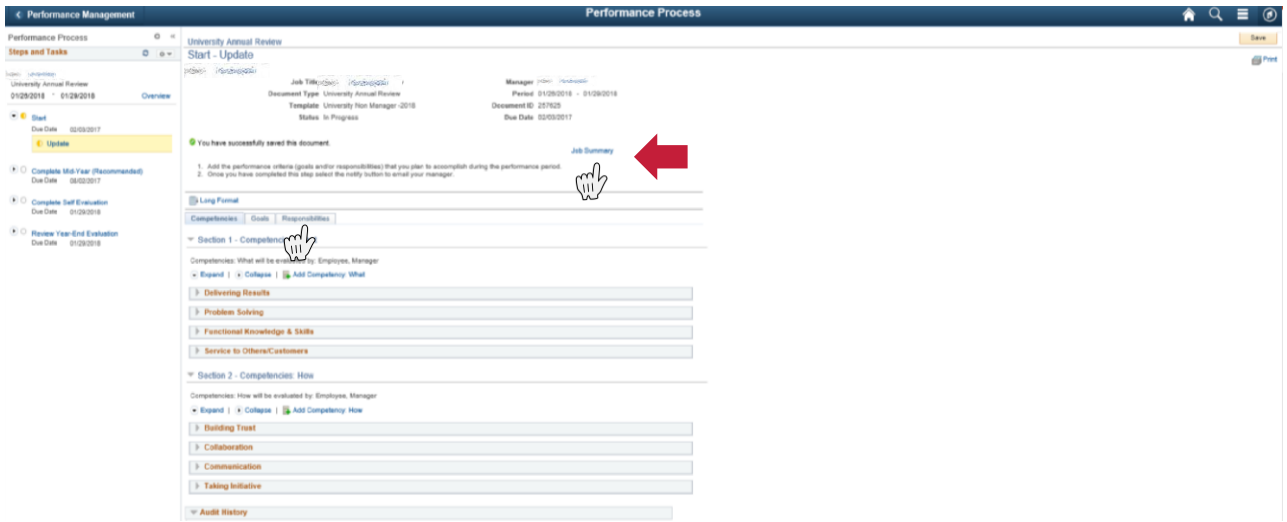
5) Click the "Goals" tab to add any goals you plan to accomplish during the performance management cycle.



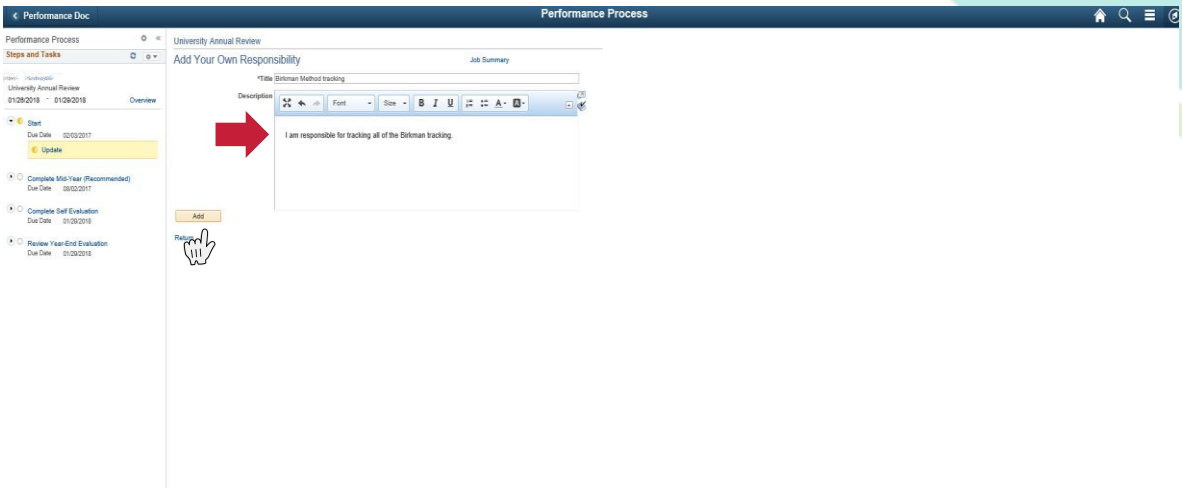
6) Click the drop down arrow to expand each section and add your goals for this performance cycle. Then click the “Save” button.



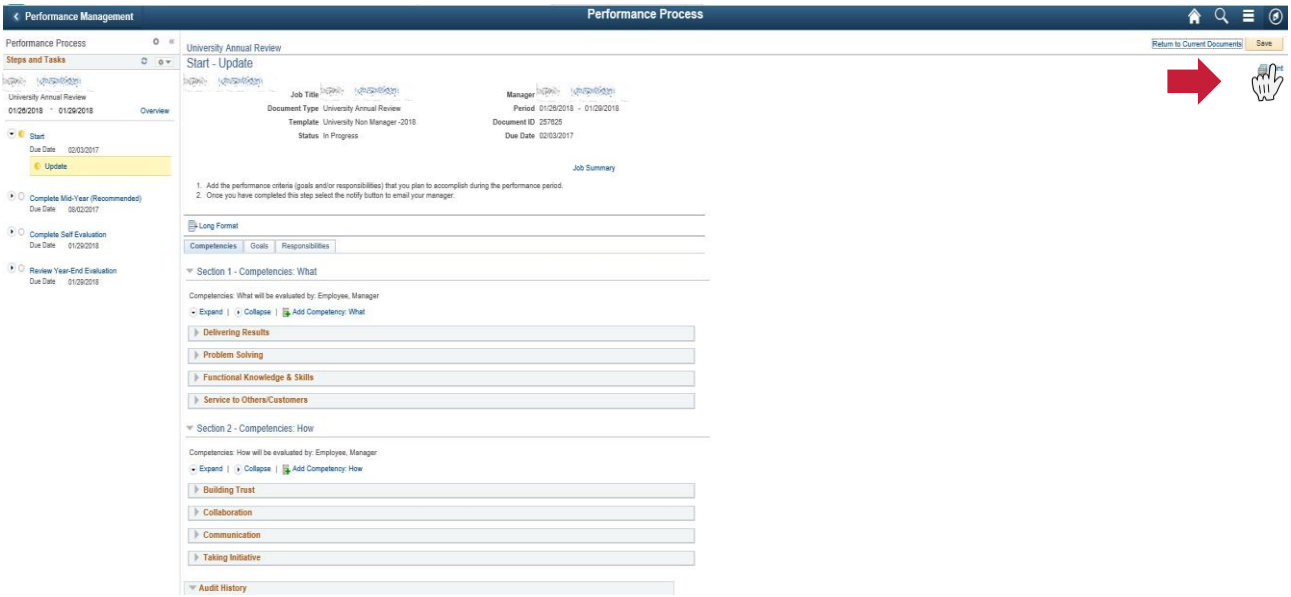
7) Click the “Responsibilities” tab to add any key job responsibilities for this performance cycle. You can see a listing of your job responsibilities by clicking the “Job Summary” link.



8) When you have finished typing a responsibility, click the “Add” button.



9) Once you have added all goals and additional responsibilities click “Save.”



10) Once you are finished and have clicked the “Save” button, tell your Manager and he/she will approve the “Start” step.

11) After your Manager approves the “Start” step, you will receive an email confirmation.

Your performance criteria (competencies, goals and/or responsibilities) have been approved for this year's performance management documents.

Employee:
Document Type: University Annual Review
Period: 09/01/2017 - 08/17/2018

Click the link below and follow the navigation to review.

https://leo.cc.emory.edu

Navigation: Self Service > Performance Management > Current Documents

12) Now you are ready to begin the Mid-Year portion of your review.

Performance Management User Guide

Employee (Non-Manager) Edition: Completing your Mid-Year Review

Your mid-year review form is accessible at any time during the first six months of the review cycle, allowing you to take notes when you wish. You don't have to wait until just before the due date to record your accomplishments. Simply record noteworthy events as they happen. When your six month review is due, just submit the form to your manager.

Why is it important to take notes and document continuously?

- Taking notes throughout the year makes the process easier
- Takes less time to complete your review
- Providing detailed documentation closer to an event is more accurate

You should record your notes under one of the Emory Competencies:

WHAT: Competencies that speak to what you do in your job

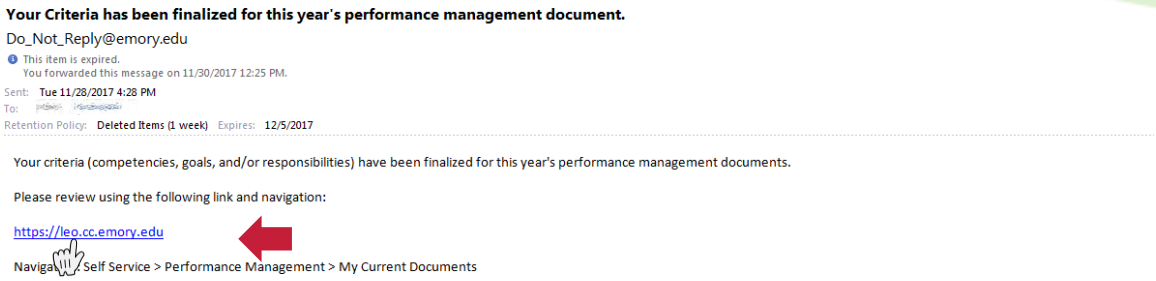
- Delivering Results
- Problem Solving
- Functional Knowledge & Skills
- Service to Others/Customers

HOW: Competencies that speak to how you do your job

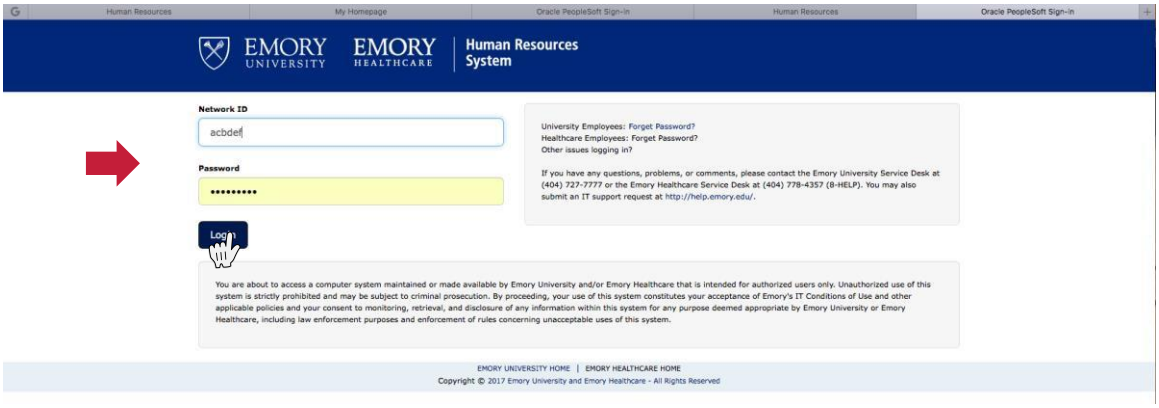
- Building Trust
- Collaboration
- Communication
- Taking Initiative

For more detailed information regarding competencies, click here. For questions or concerns please contact Learning and Organizational Development at x77844.

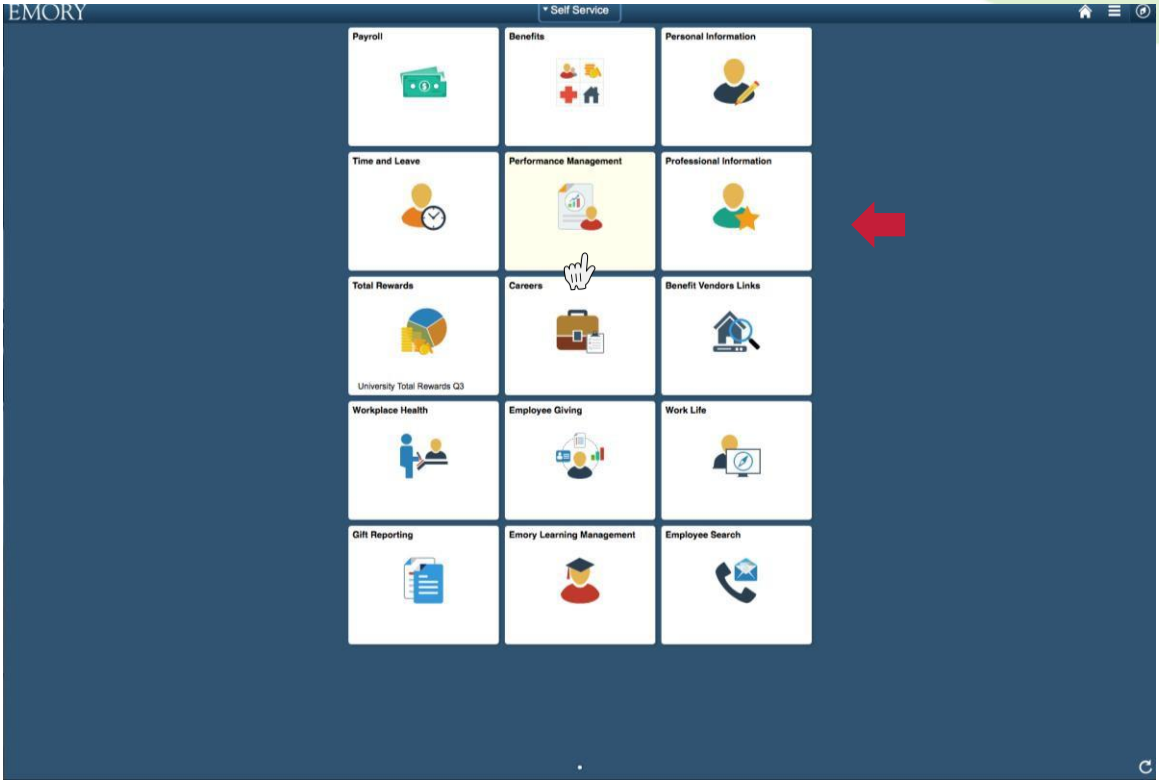
1) When your review forms were created by your manager, you received an e-mail notifying you. To access your performance management documents, you may follow the link in the e-mail. If you did not receive the link you can go to https://leo.cc.emory.edu



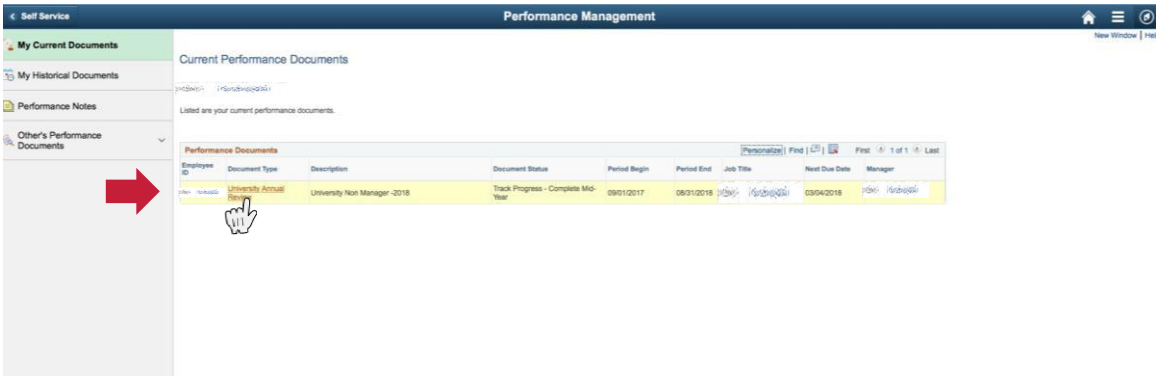
2) Type in your user name (Network ID) and password.



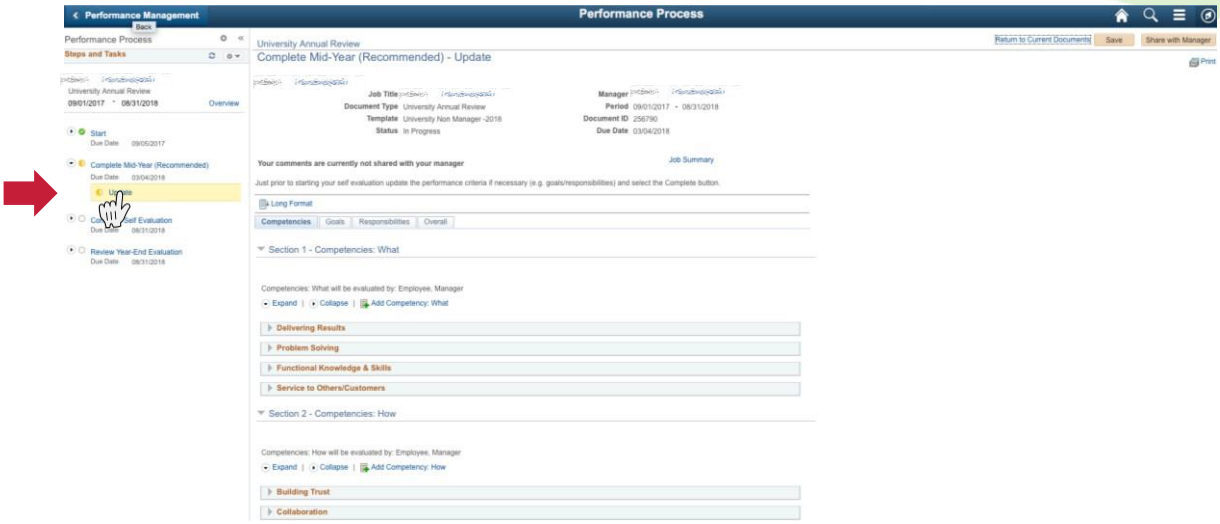
3) Click on the “Performance Management” tile.



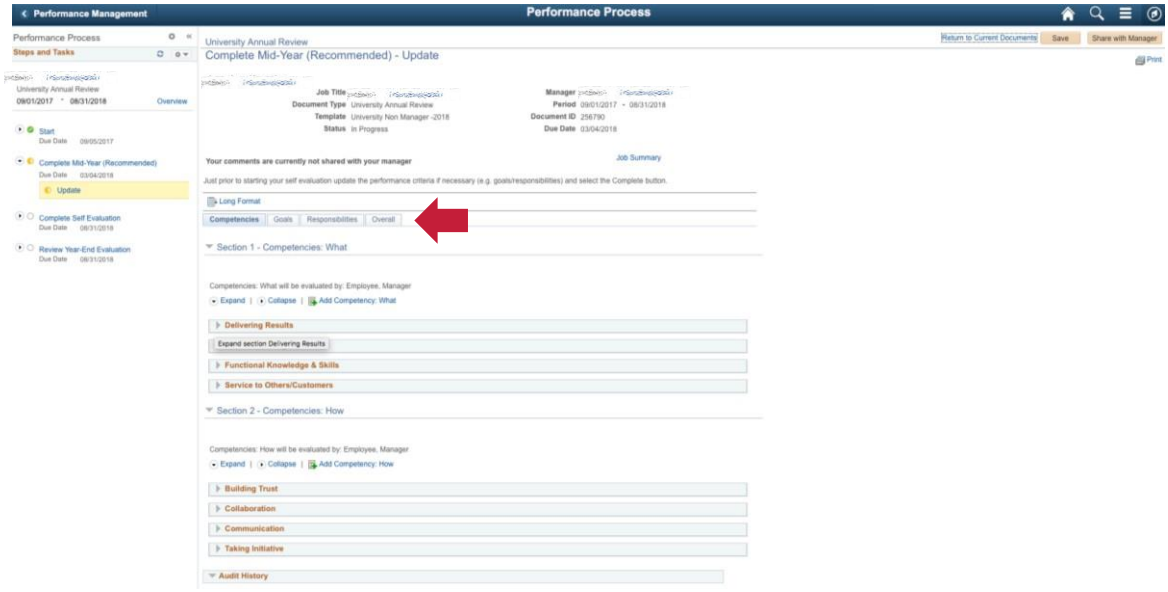
4) Click on your ”University Annual Review.”



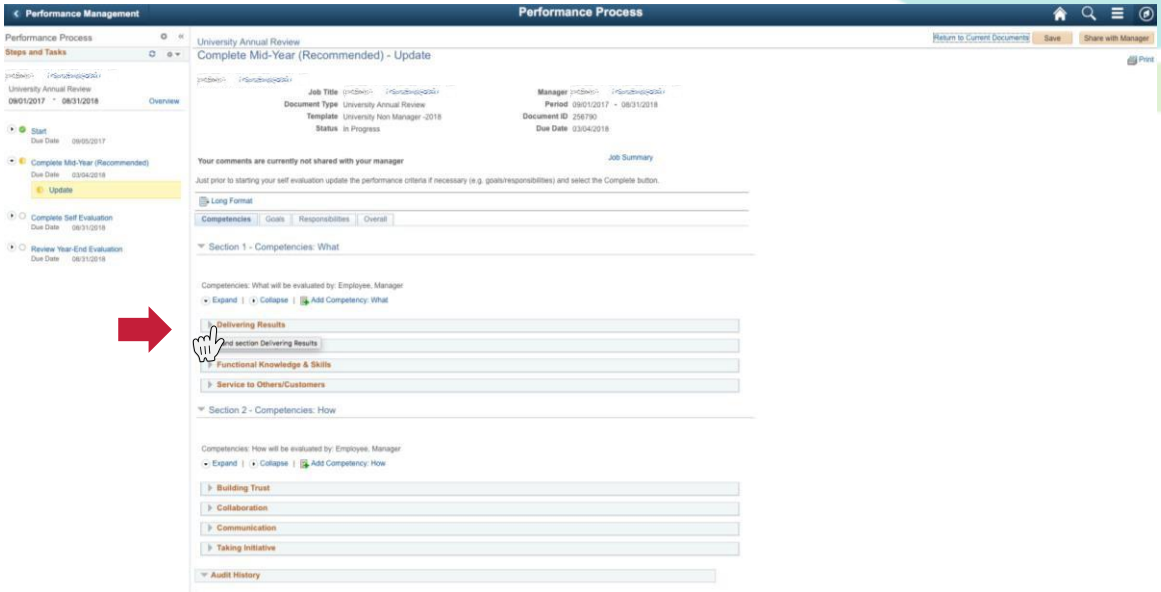
5) Below “Complete Mid-Year Review,” select “Update.”



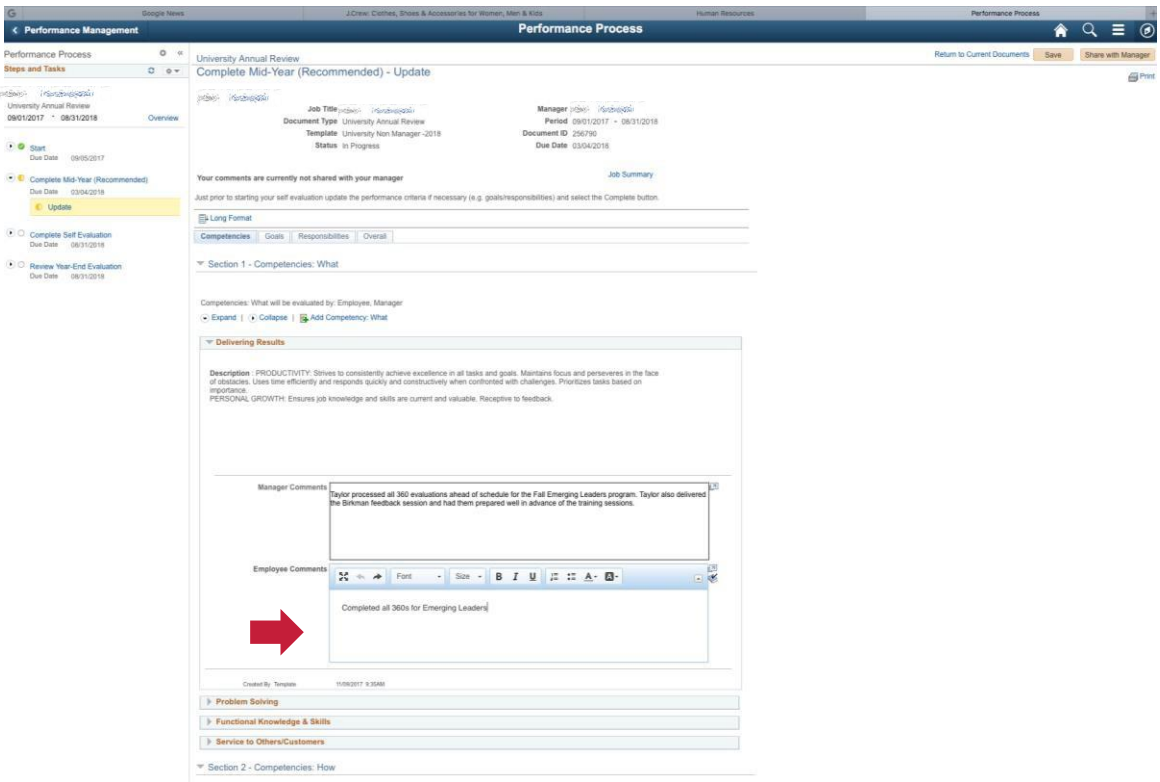
6) Here you will see the main screen of your performance document. You can navigate the main section of each stage (Mid-Year Review, Self-Evaluation, and Year-End Review) with the tabs below. These sections are Competencies, Goals, and Responsibilities.



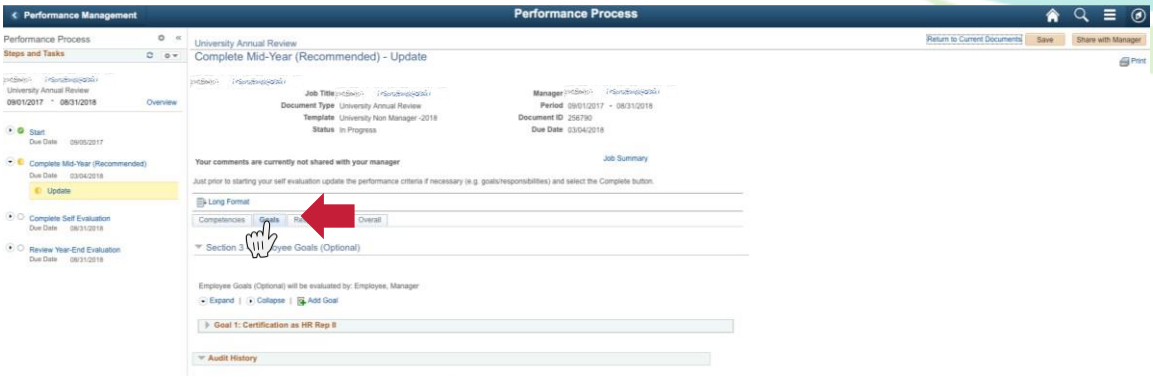
7) To expand each of the competencies, click on the drop down icon.



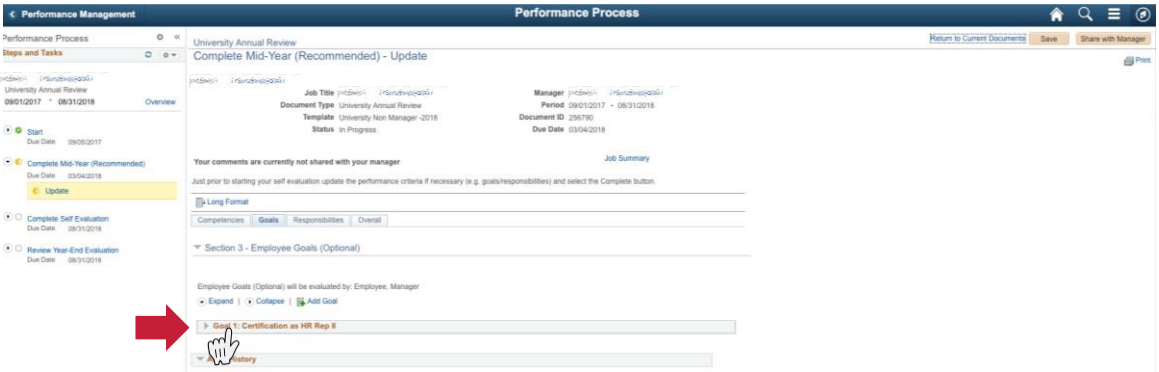
8) To document your achievements and behaviors write them in the "Employee Comments" section. Repeat for all competencies.



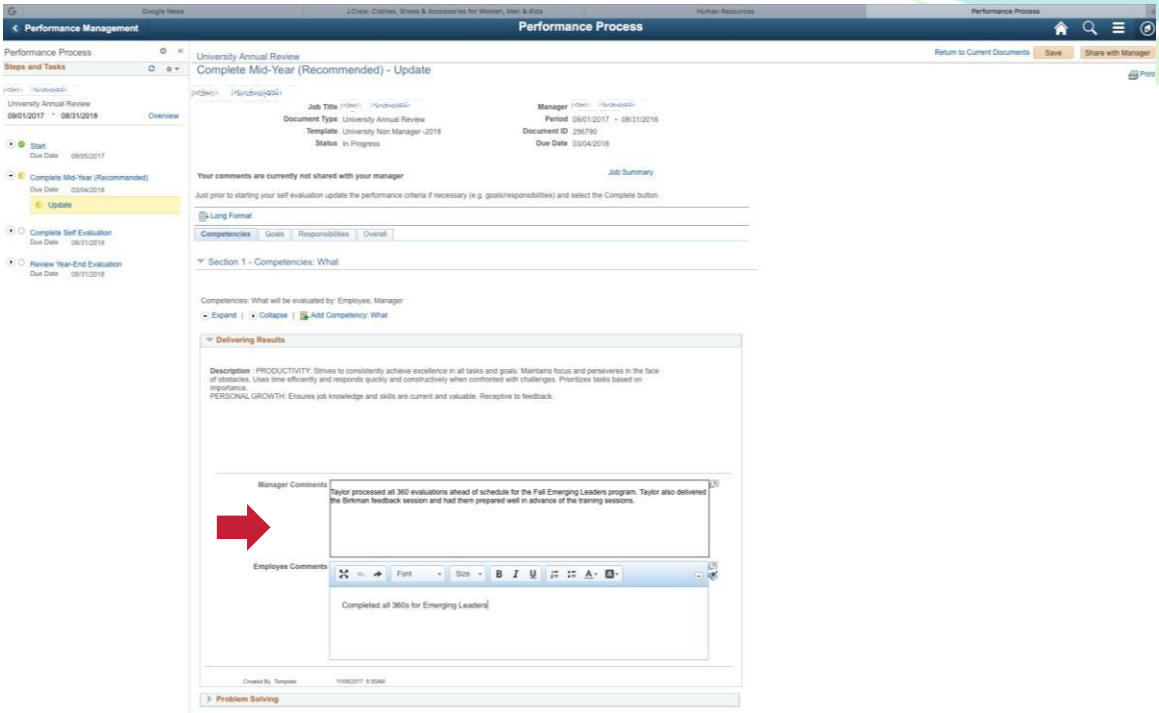
9) If you and your manager set up goals, click on the “Goals” tab.



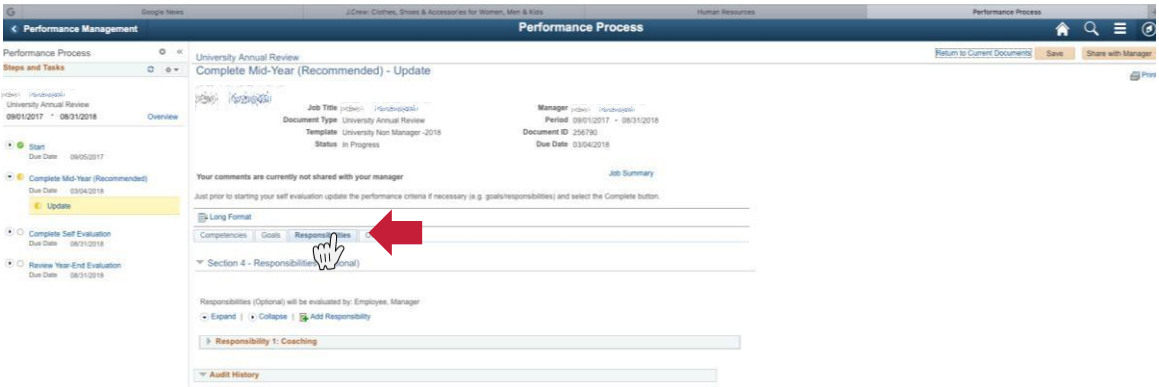
10) Click the drop down to expand your goals.



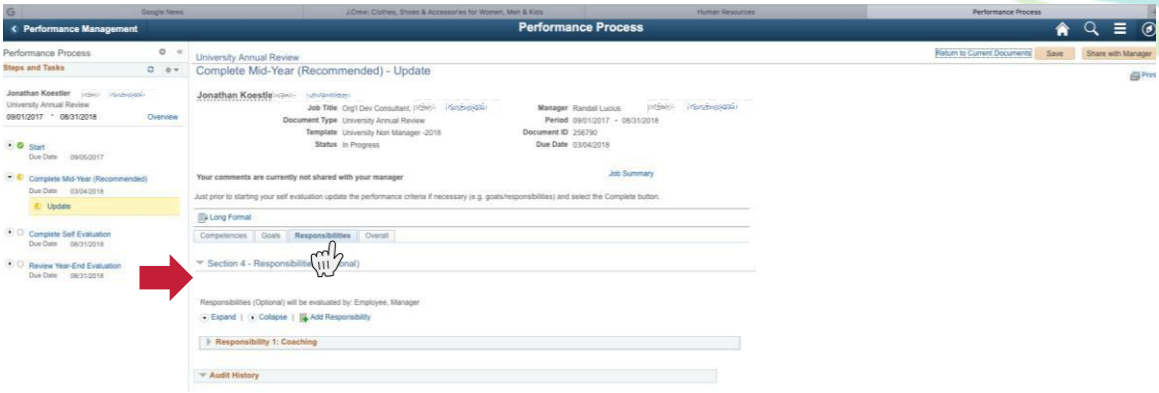
11) Document your progress towards each of your assigned goals.



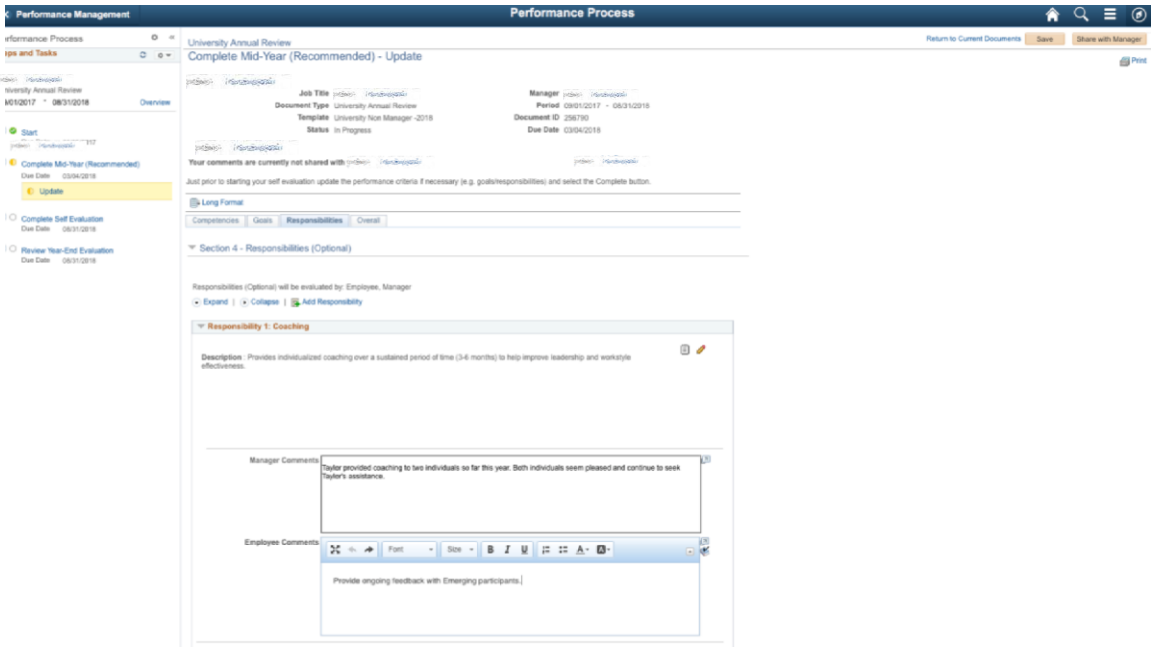
12) If you and your manager set up responsibilities, click on the “Responsibilities” tab.



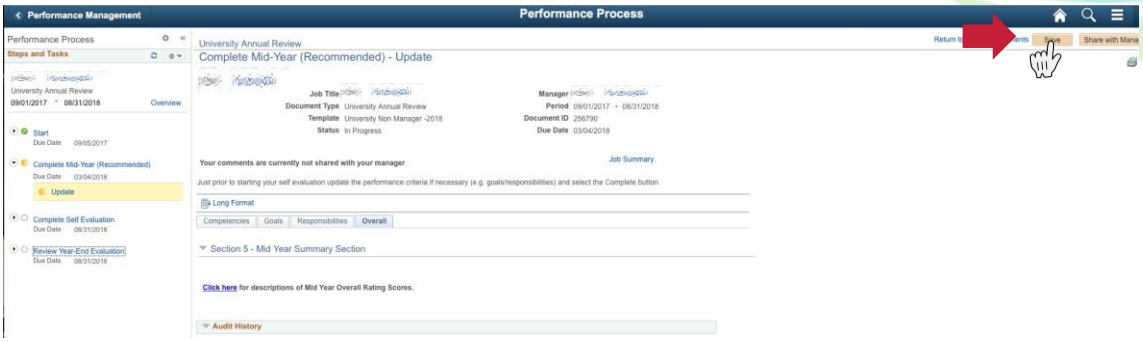
13) Click on the drop down tab to view each of your responsibilities.



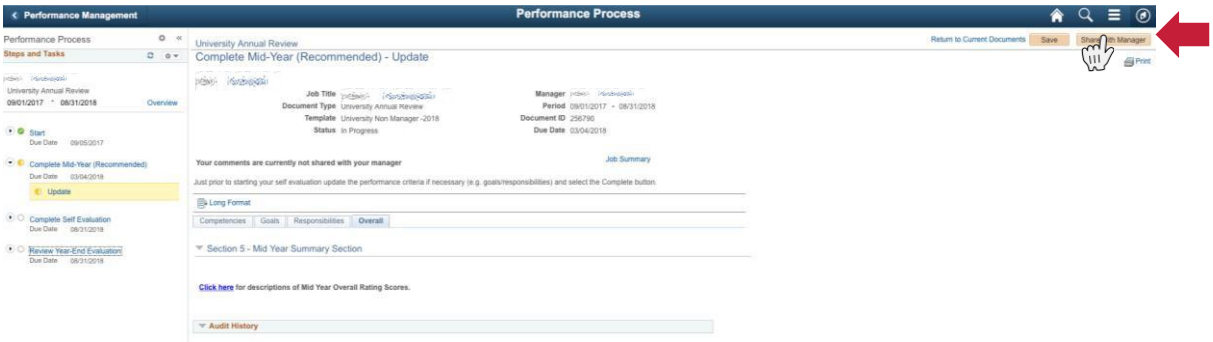
14) Document how have you fulfilled your responsibilities.



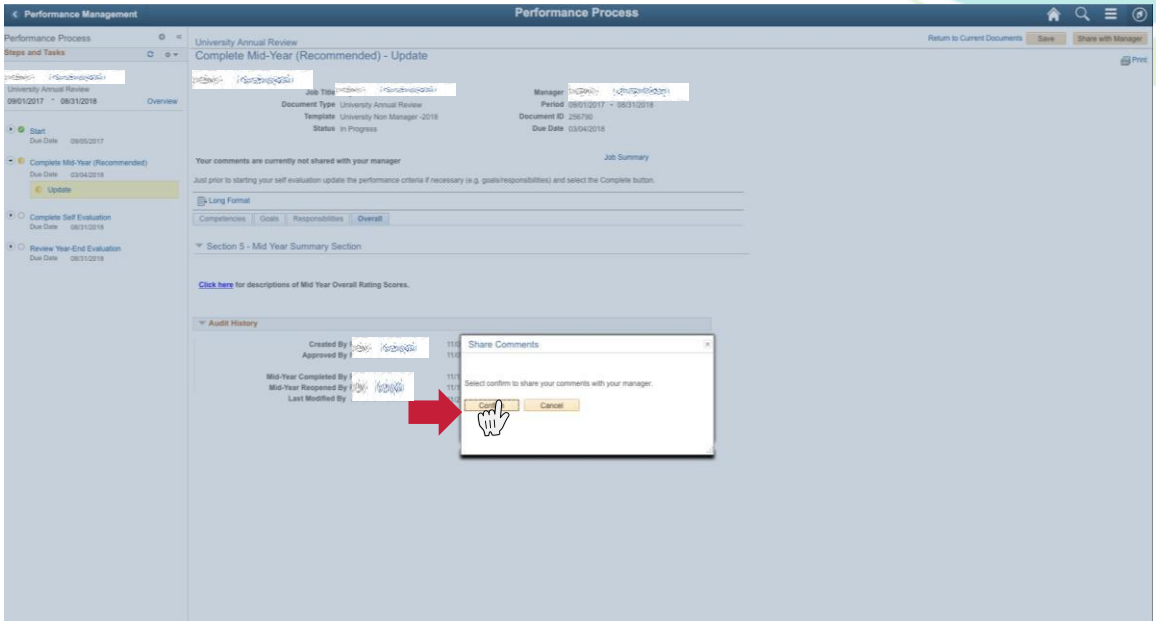
15) To save your document, click on the ”Save” button.



16) When you are done with your comments, and ready to share with your manager click on the “Share with Manager” button. If you need to make an edit to your comments after you have clicked “Share,” then click the “Stop Sharing” button in the upper right hand corner.



17) At this point you'll be asked for a confirmation. Click "Confirm."



You and your supervisor should then have a face-to-face meeting to discuss your mid-year performance. This is an opportunity for you and your supervisor to clarify where you stand in relation to the expectations of Emory, the department and your supervisor. It assures mutual understanding of responsibilities and work assignments and provides assistance and guidance in helping you improve and prepare for advancement.

After your meeting, your supervisor will mark the form complete.

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Employee (Non-Manager) Edition: Completing Your Year-End Review

Your self evaluation form for the Year-End review should be available to you as soon as the Mid-Year is complete (or the deadline for the Mid-Year has passed). The self-evaluation form is accessible at any time during the second six months of the review cycle, allowing you to take notes when you wish. You don't have to wait until just before the due date to record your accomplishments. Simply record noteworthy events as they happen. When your Year-End review is due, just submit the form to your manager.

Why is it important to take notes and document continuously?

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You should record your notes under one of the Emory Competencies:

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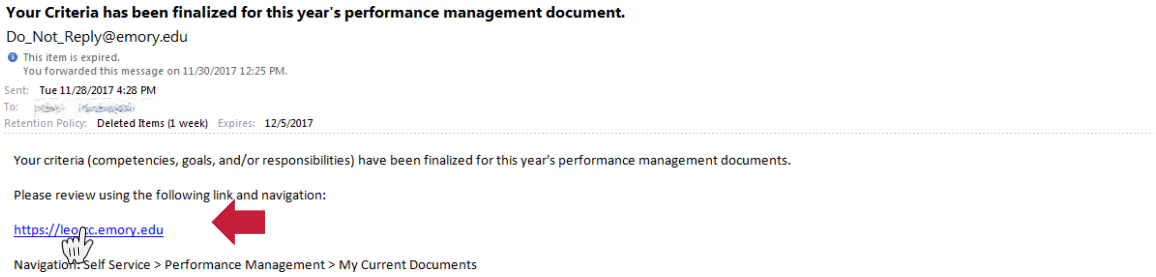
- Building Trust
- Collaboration
- Communication
- Taking Initiative

You will be notified via email when the self-evaluation form for the Year-End Review becomes available.

For more detailed information regarding competencies, click here. For questions or concerns please contact Learning and Organizational Development at x77844.

1) Once your mid-year is complete, you should have immediate access to your self-evaluation form. Even if you did not complete a mid-year form, when your review forms (for University Annual Review) were created, you should have received an e-mail notifying you. To access your performance management document, you may follow the link in the e-mail. If you did not receive the email and/or link you can go to: https://leo.cc.emory.edu.



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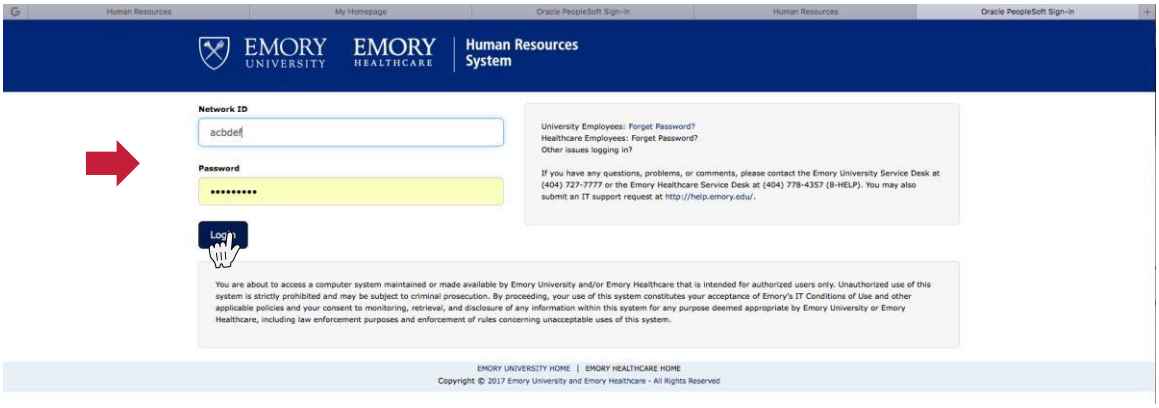

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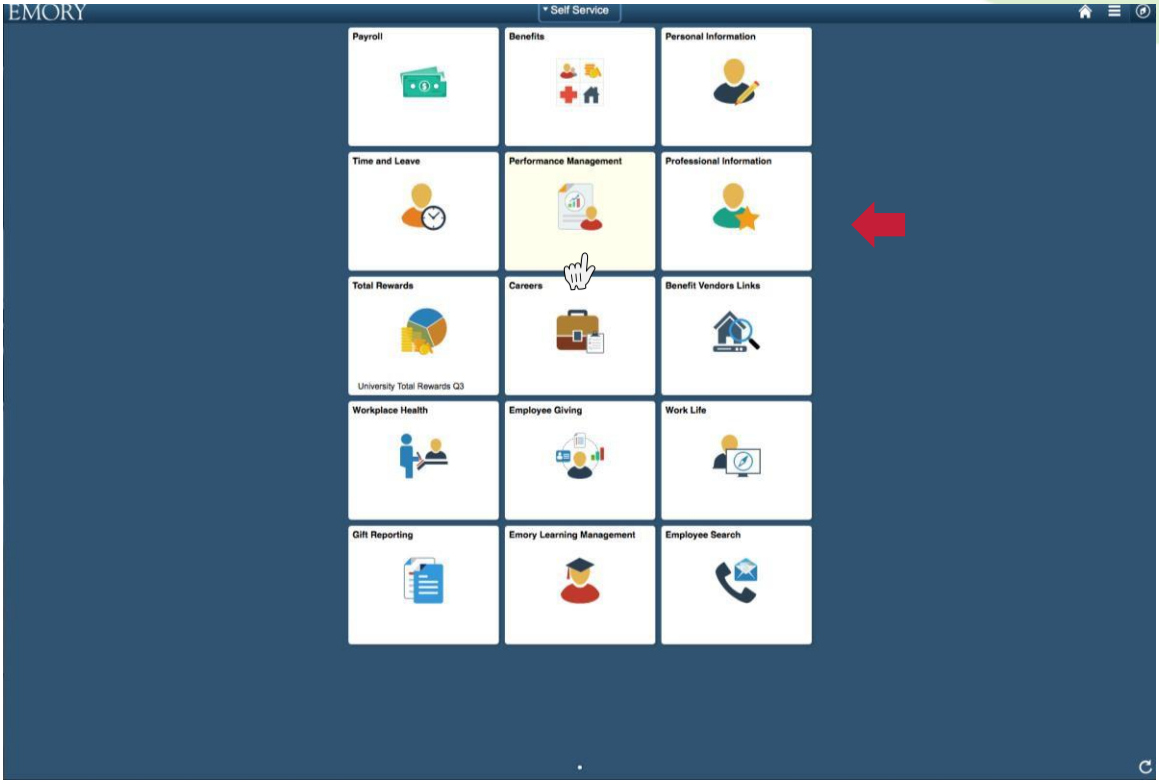

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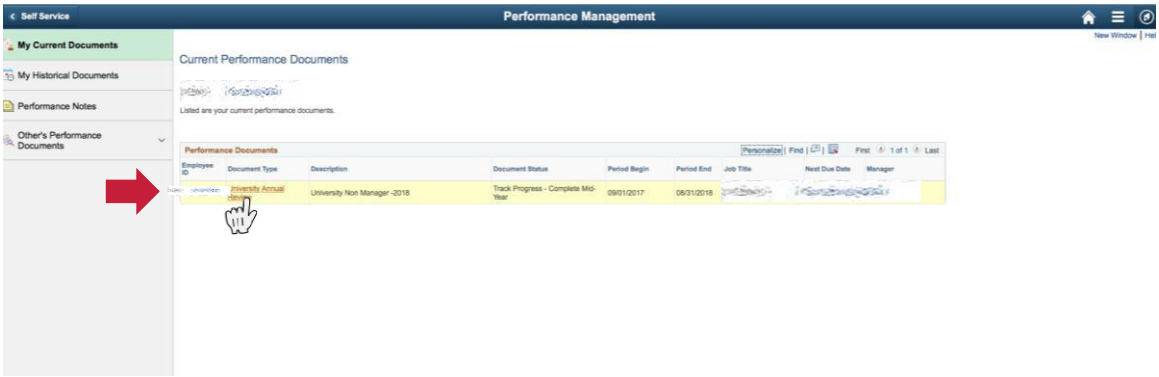
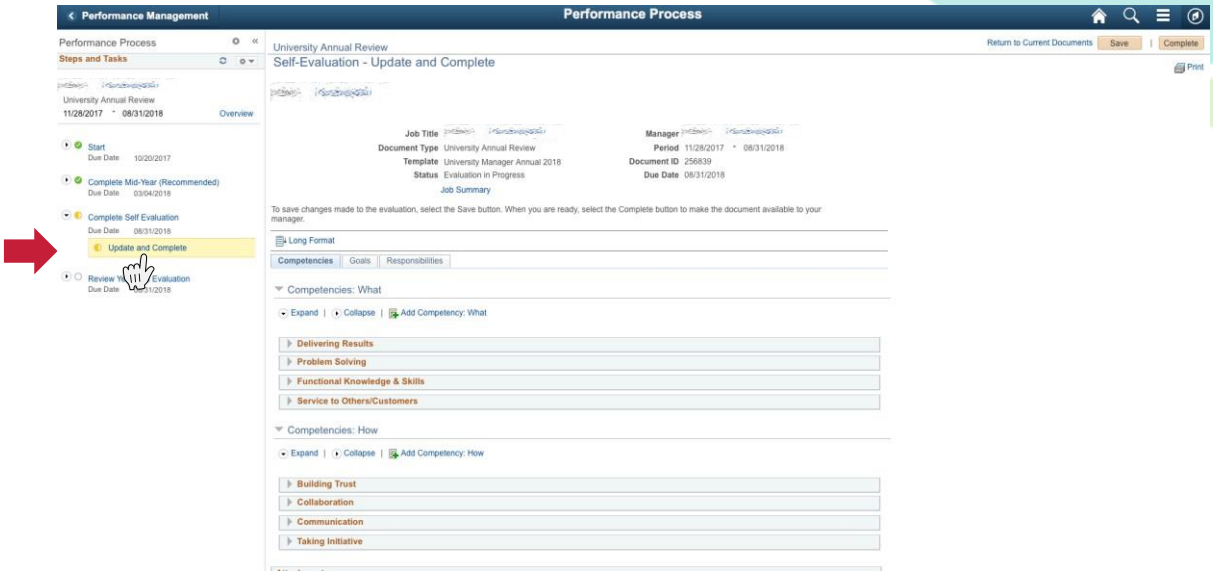


5) Below “Complete Self Evaluation,” select “Update and Complete.”



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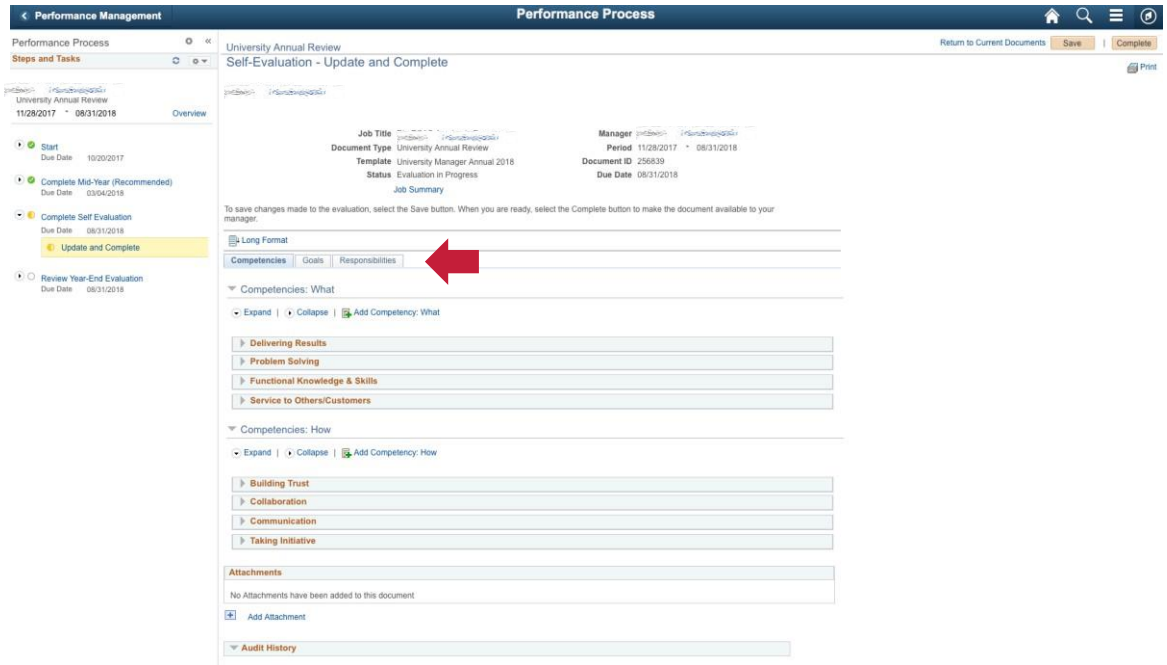
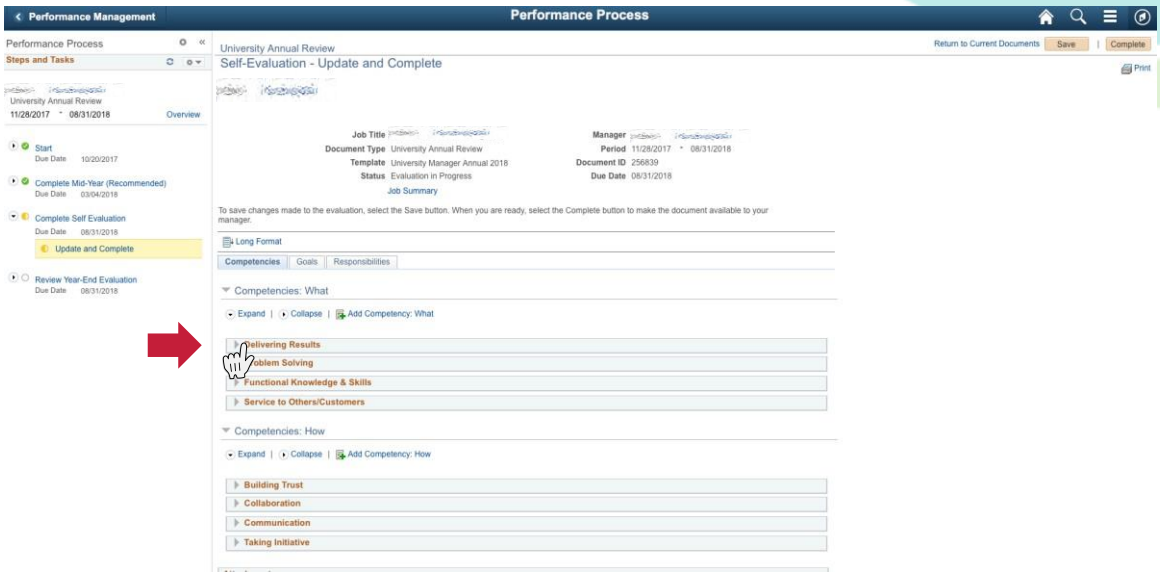
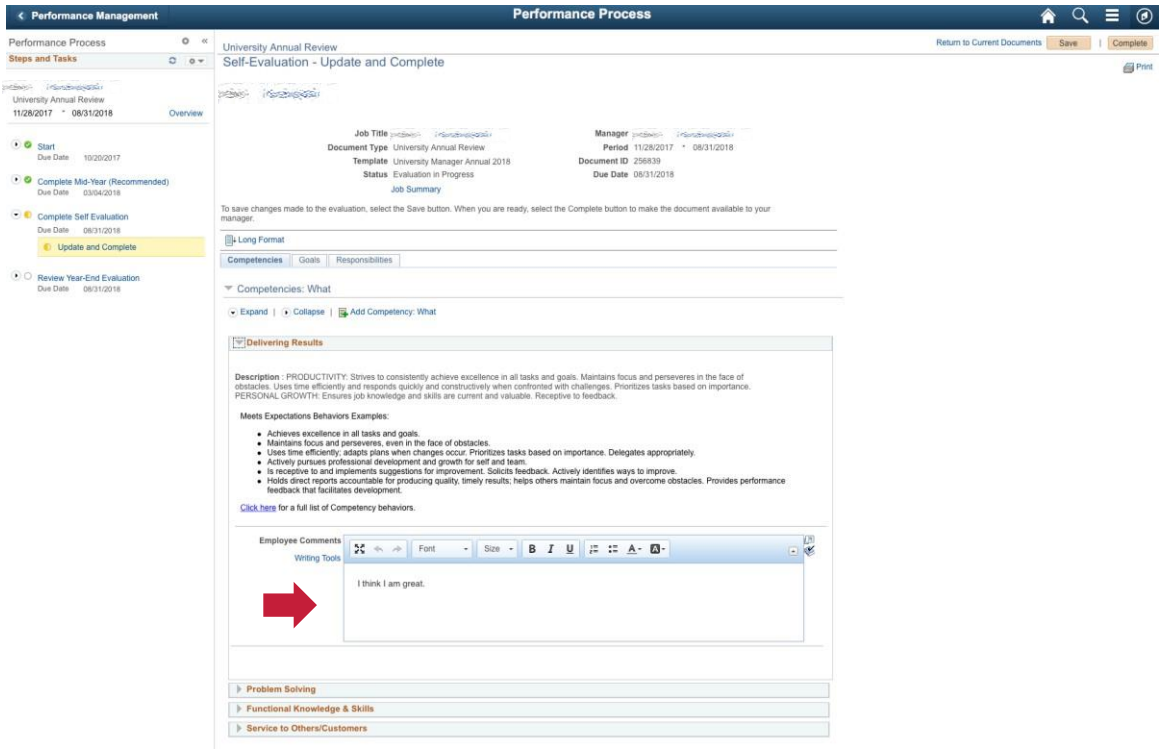


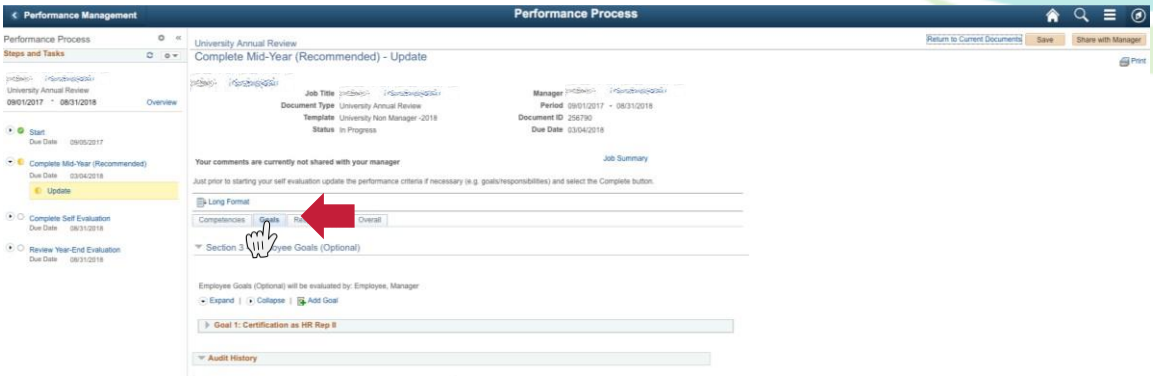
7) To expand each of the competencies, click on the drop down icon.



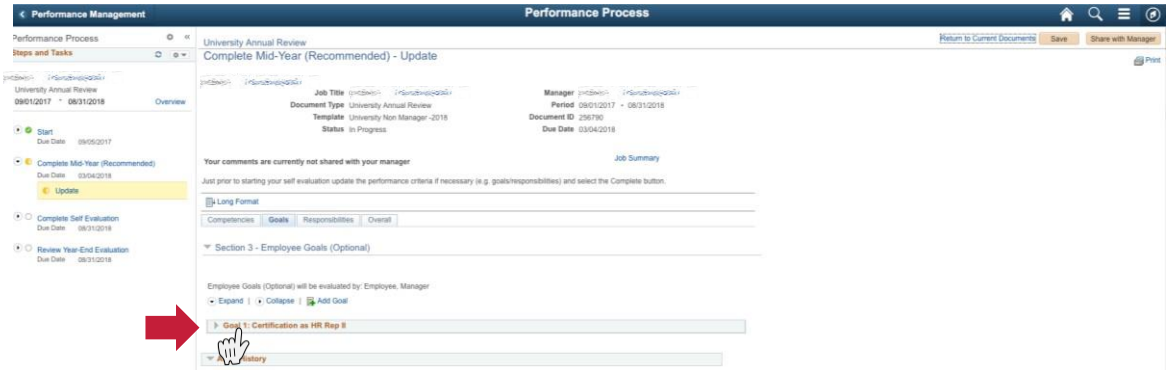
8) To document your achievements and behaviors write them in the "Employee Comments" section. Repeat for all competencies.



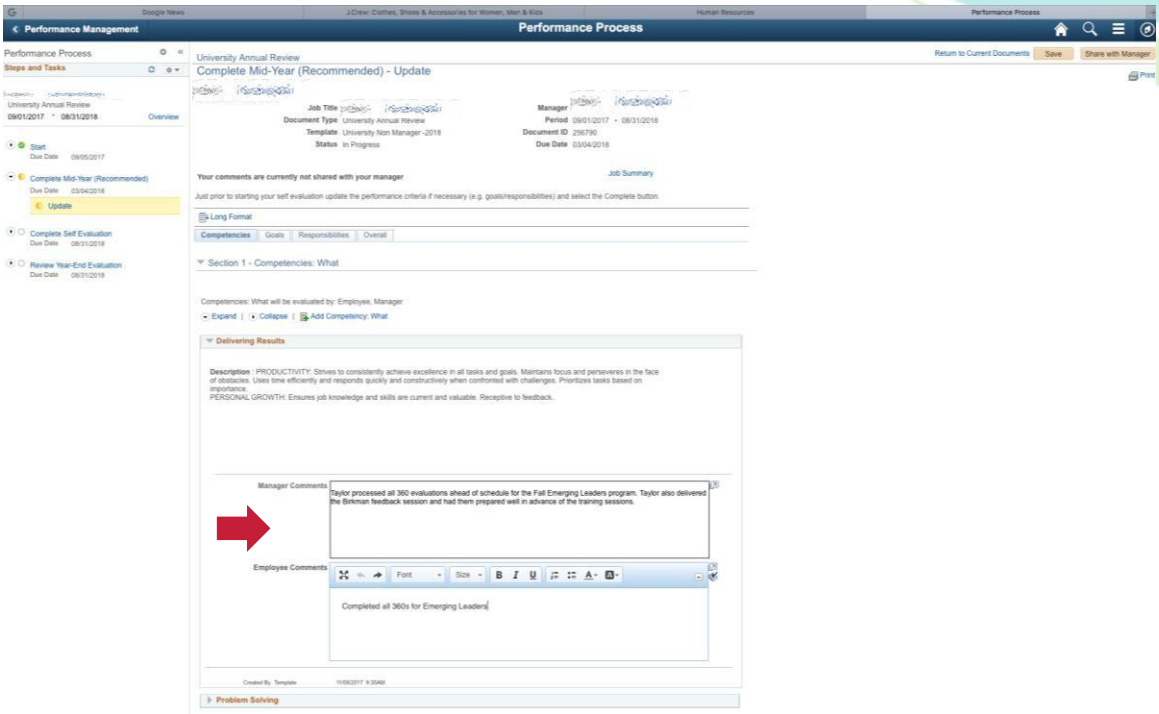
9) If you and your manager set up goals, click on the “Goals” tab.



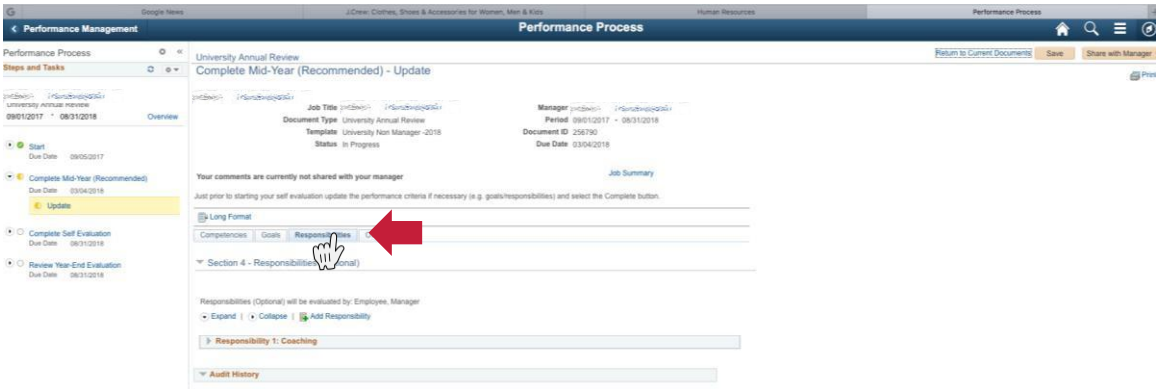
10) Click the drop down to expand your goals.



11) Document your progress towards each of your assigned goals.



12) If you and your manager set up responsibilities, click on the “Responsibilities” tab.



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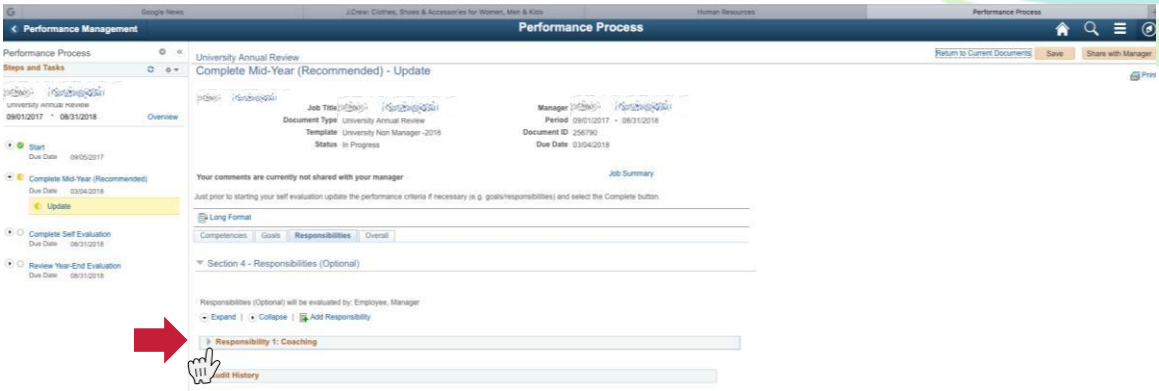

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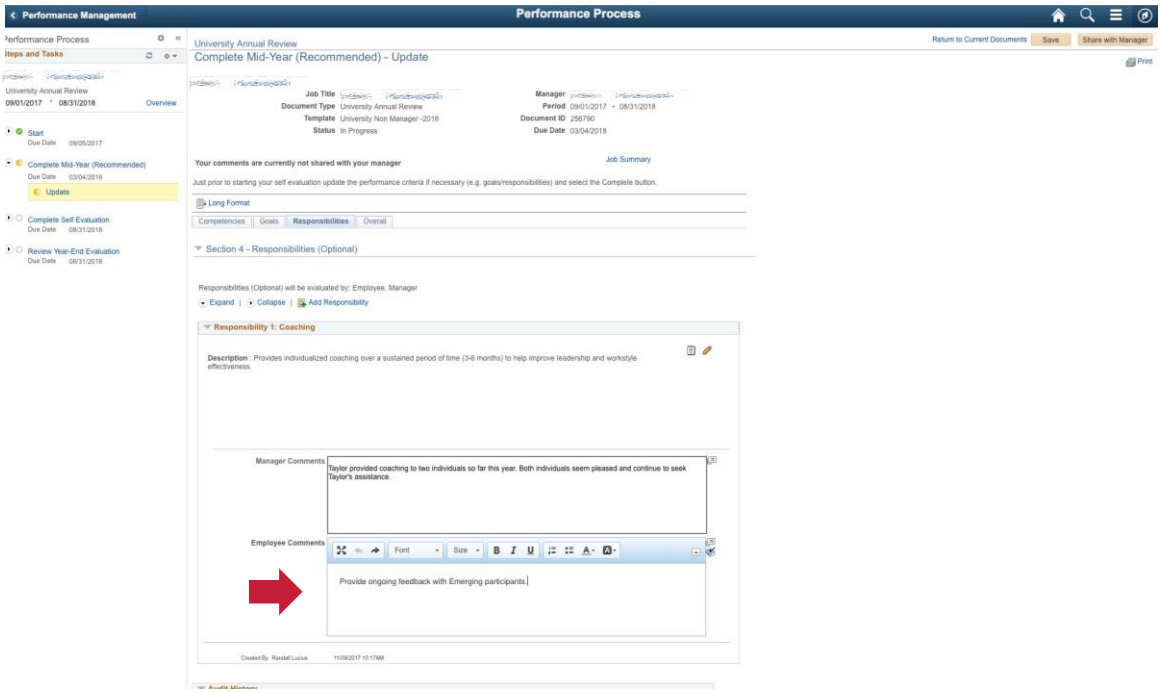
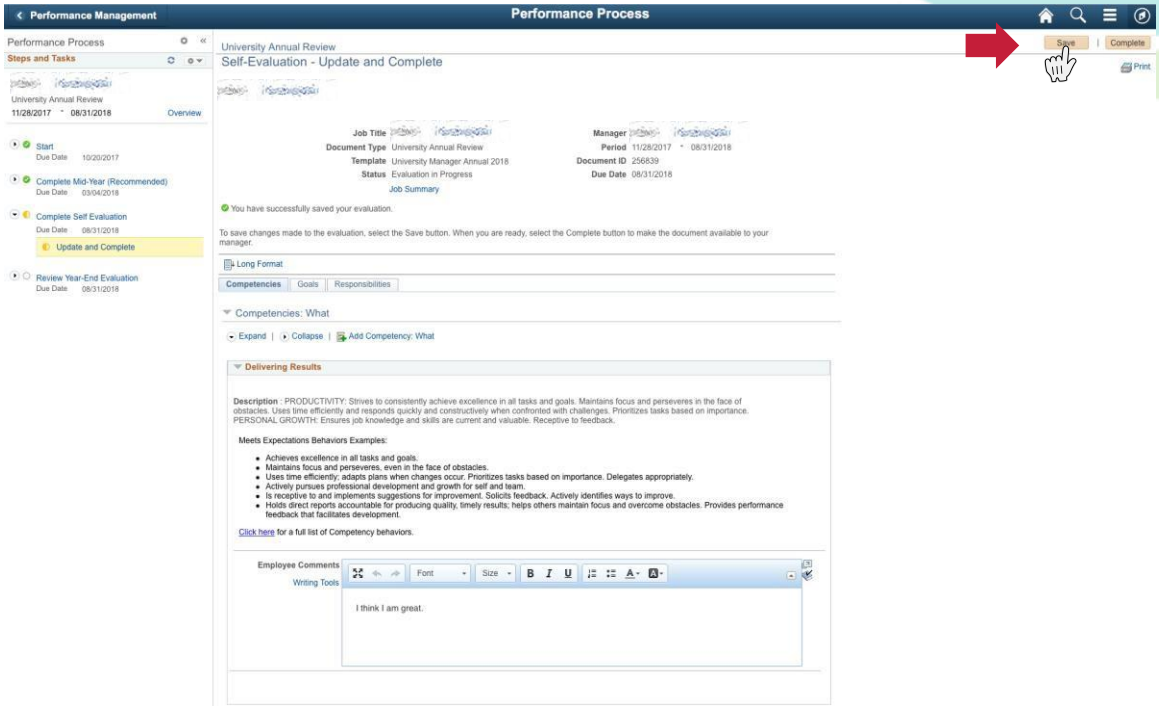
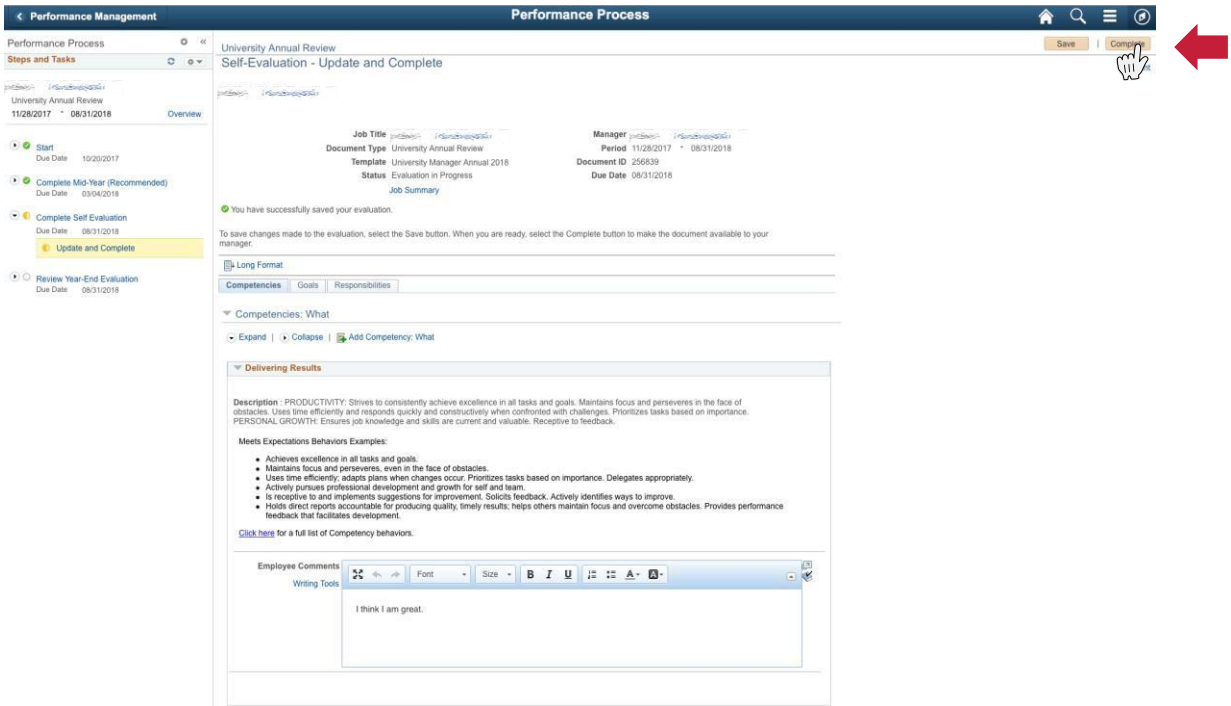


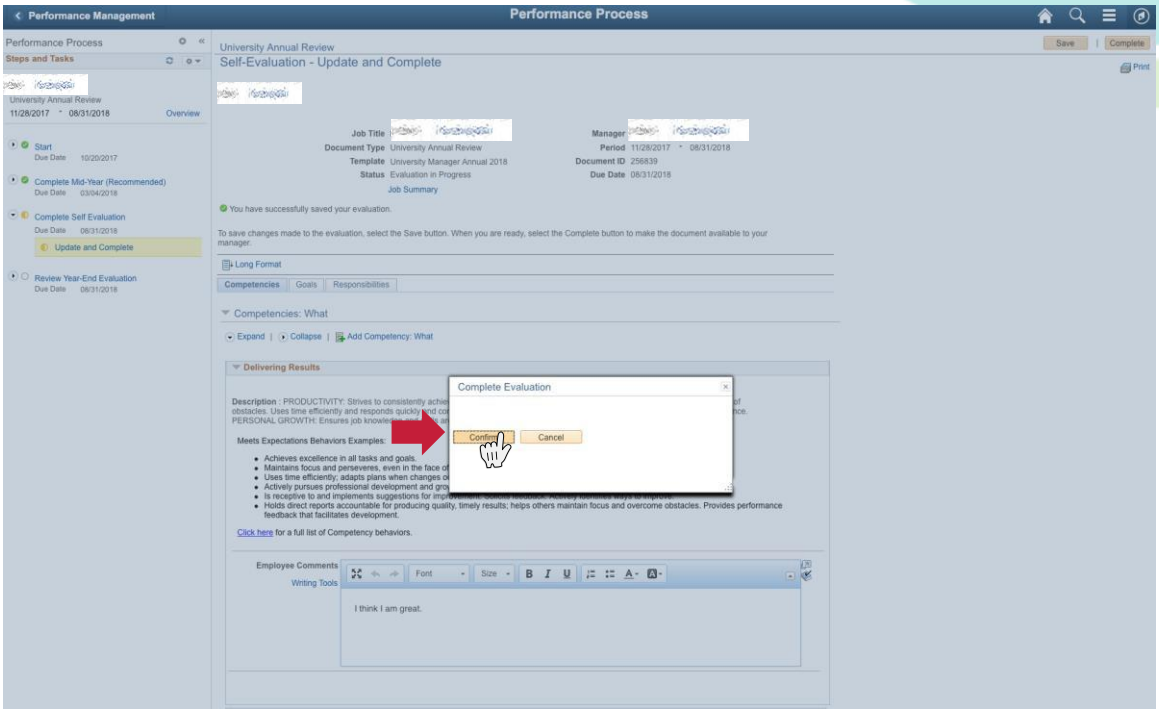
15) To save your document, click on the ”Save” button.



16) When you are done with your comments, and ready to share with your manager, click on the “Complete” button.



17) At this point you will be asked for a confirmation. Click ”Confirm.”



You and your manager should then have a face-to-face meeting to discuss your Year-End performance. This is an opportunity for you and your supervisor to clarify where you stand in relation to the expectations of Emory, the department and your supervisor. It assures mutual understanding of responsibilities and work assignments and provides assistance and guidance in helping you improve and prepare for advancement.

After your meeting, the year-end form should be “signed” by clicking on the acknowledge button.

Performance Management User Guide

Employee (Non-Manager) Edition: Providing Upward Feedback

At Emory, staff members may have the opportunity to provide feedback about their supervisor to their supervisor's leader regarding strengths and any areas for development. A supervisor must have two or more direct reports to participate. Direct reports are asked by their supervisor's leader to provide comments to the following questions:

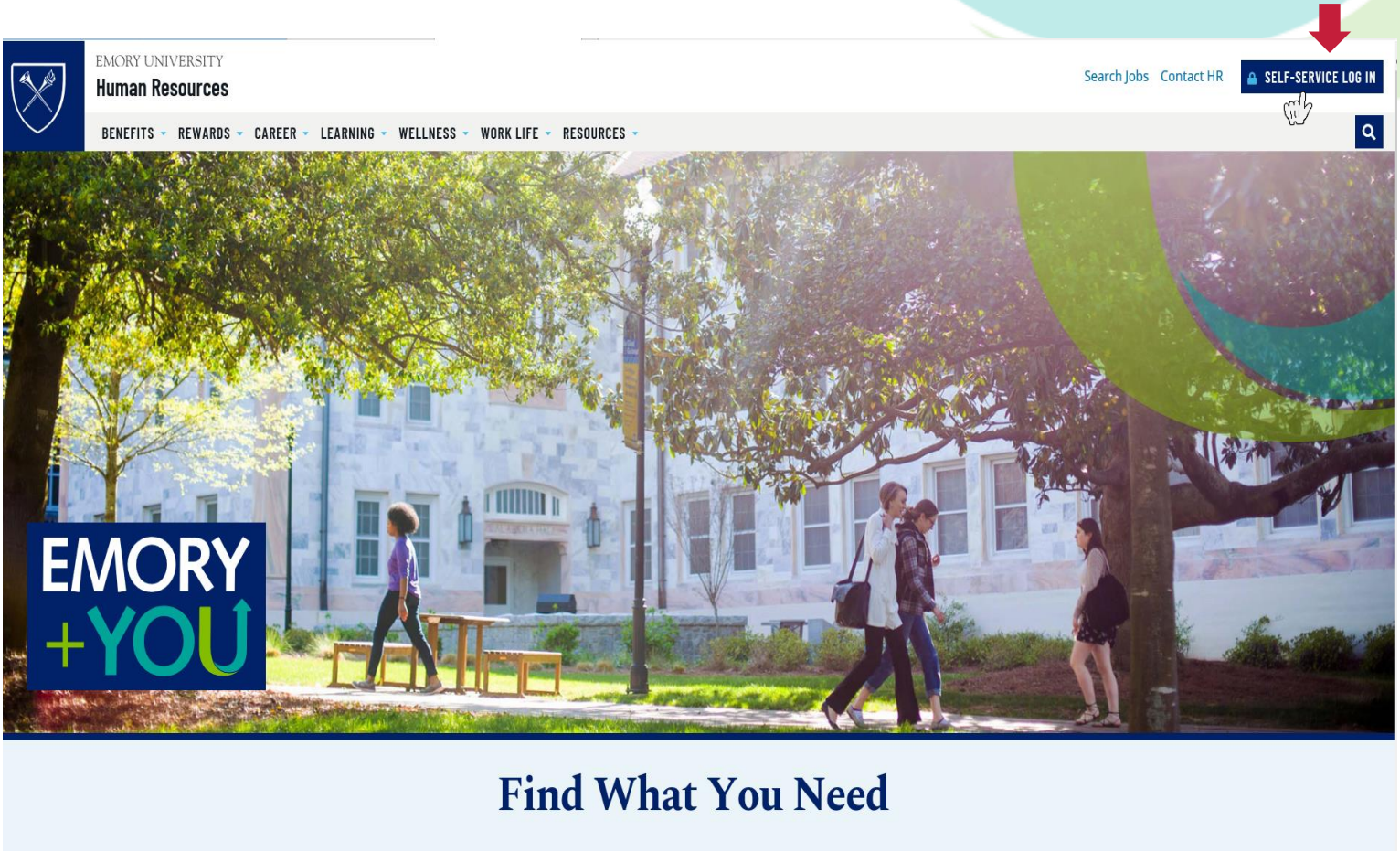
1. What do you see as your supervisor's greatest strengths?
2. What area(s) do you think your supervisor should develop in order to be more effective?
3. Are there other comments about your supervisor that you would like to share?

Providing upward feedback is entirely optional but strongly encouraged. All feedback will be kept anonymous and a supervisor's leader will only receive the feedback if two or more direct reports complete the questionnaire.

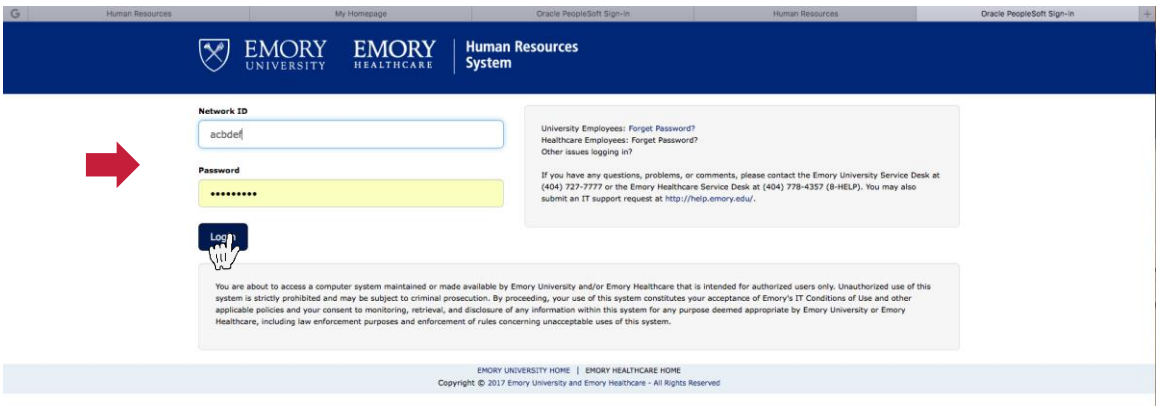
How to write comments: When responding to these questions, it is easy to reflect on only your most recent interactions with your supervisor, but it is best to think collectively of your supervisor's behavior throughout the year. Reflect on strengths and any areas that can help them improve. If you have suggestions for improvement, explain *why* you would like changes and *why* these things are important to you or *how* changes would add value. Also, write responses that are specific but not so detailed that you could be easily identified.

For questions or concerns please contact Learning and Organizational Development at x77844.

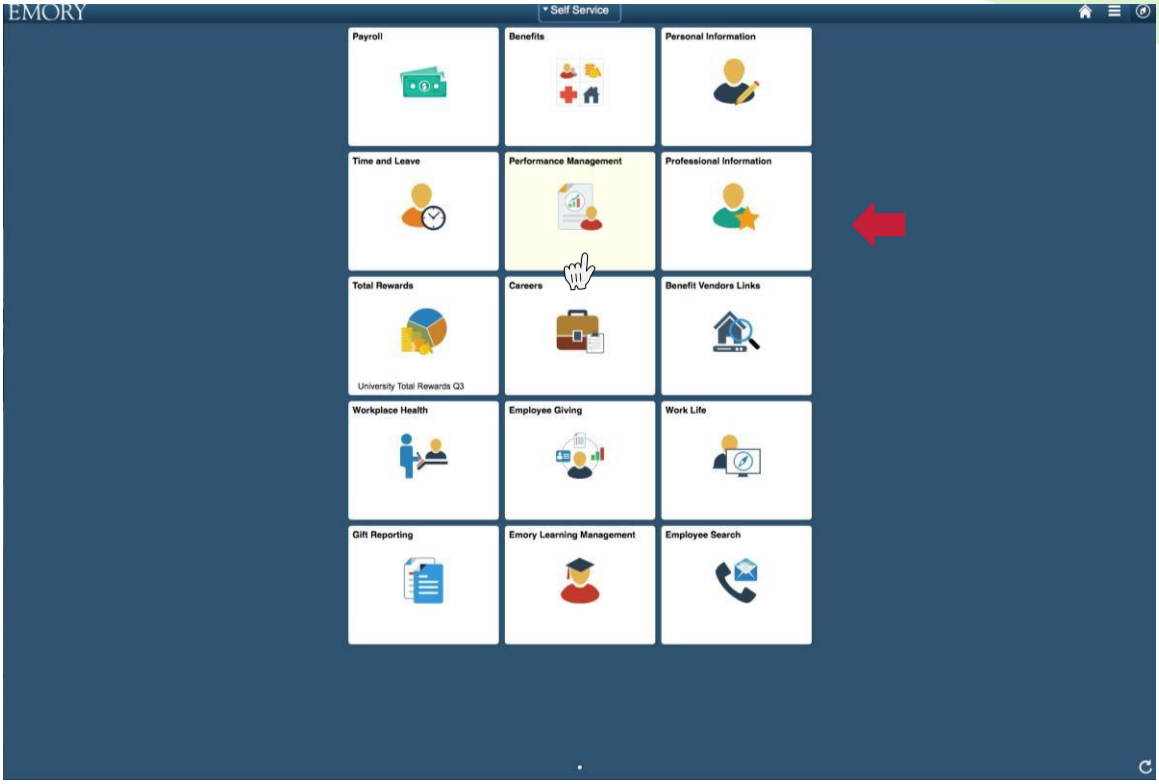
1) Begin by going to the Human Resources page (www.hr.emory.edu) and selecting “Self-Service Login."



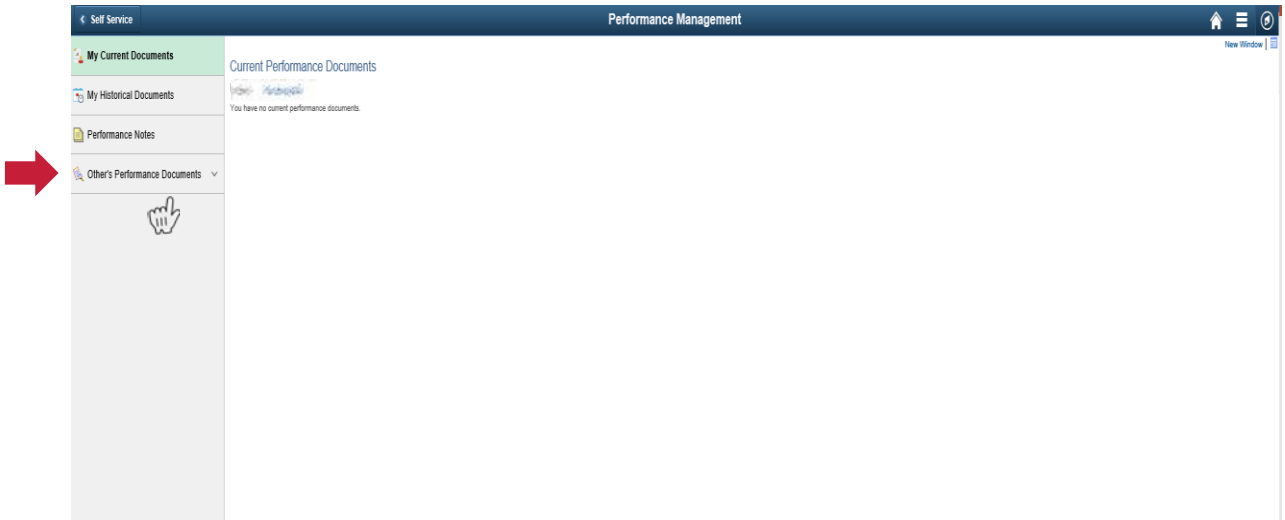
2) Type in your user name (Network ID) and password.



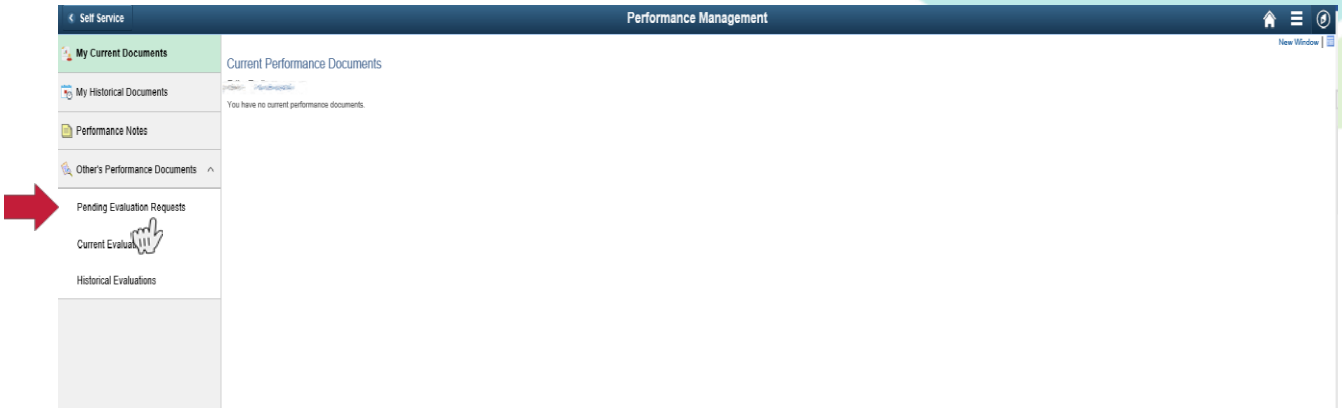
3) Click on the “Performance Management” tile.



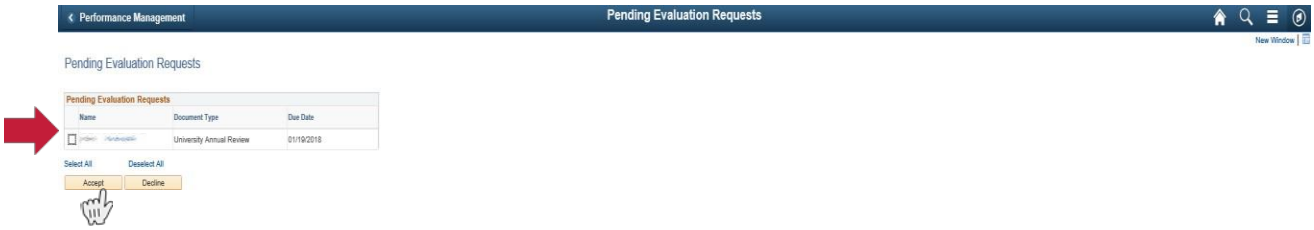
4) Click on the link for ”Other’s Performance Documents.”



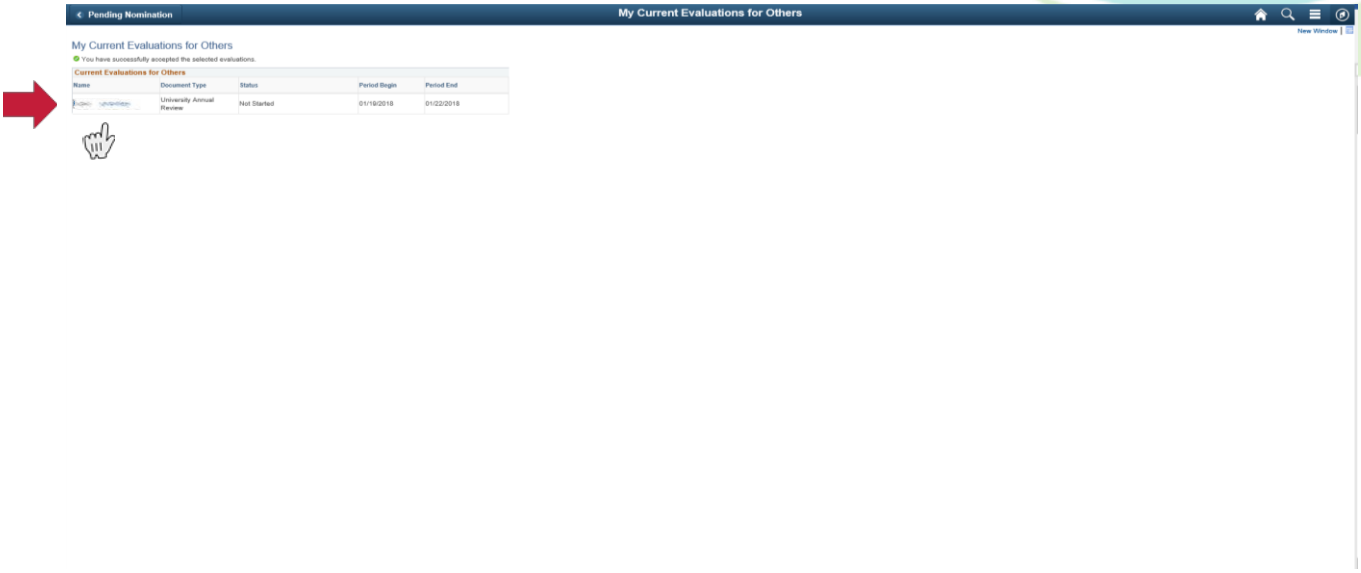
5) Click on Pending Evaluation Requests.



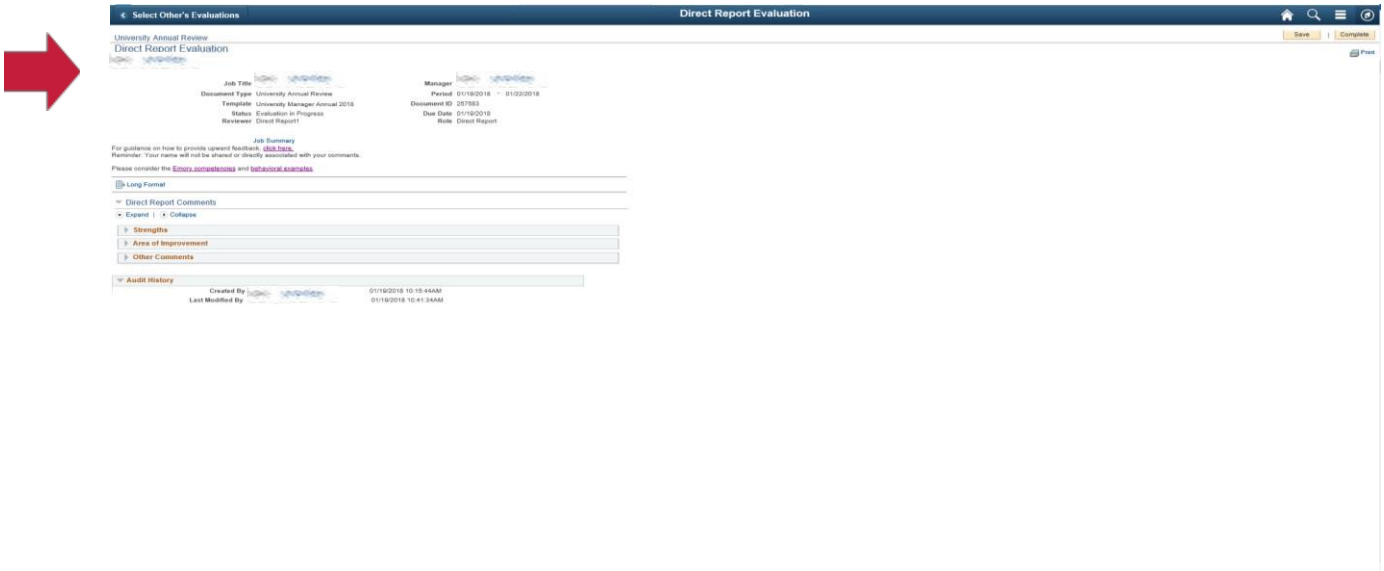
6) Click box next to name of supervisor you want to provide feedback for and click "Accept."



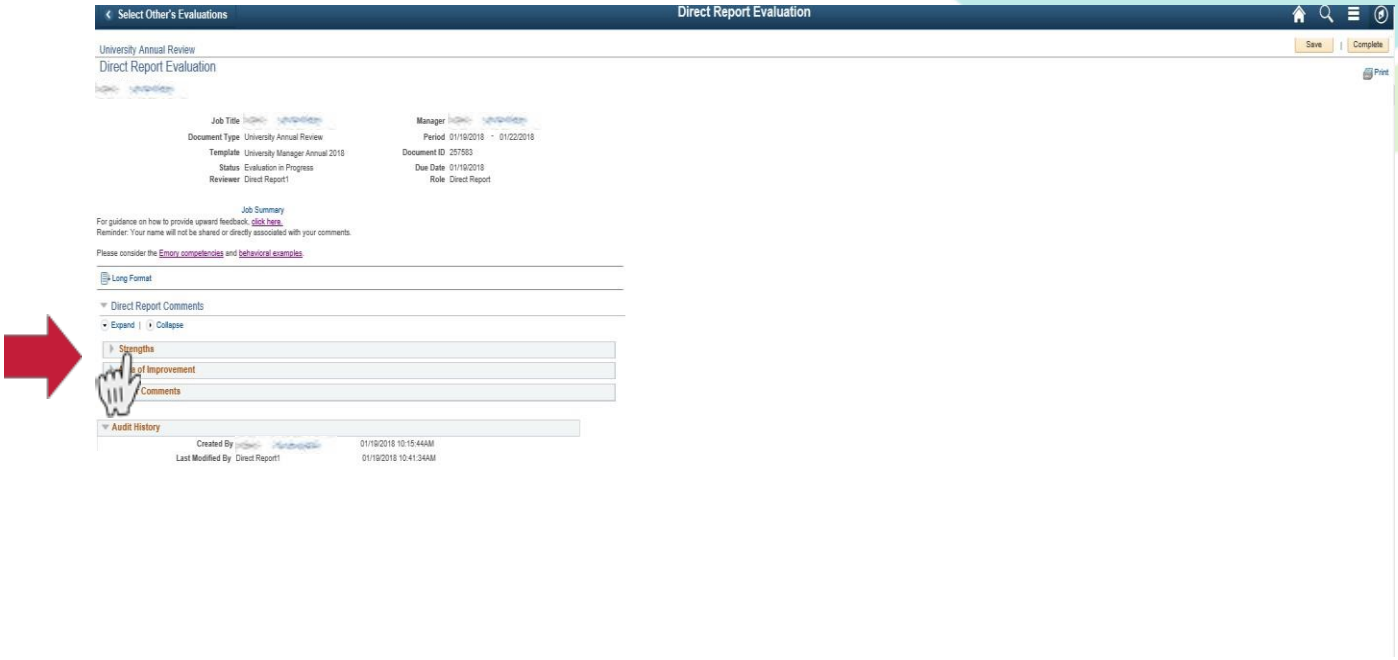
7) You will see the “My Current Evaluations for Others” page. Click on the supervisor that you want to provide upward feedback.



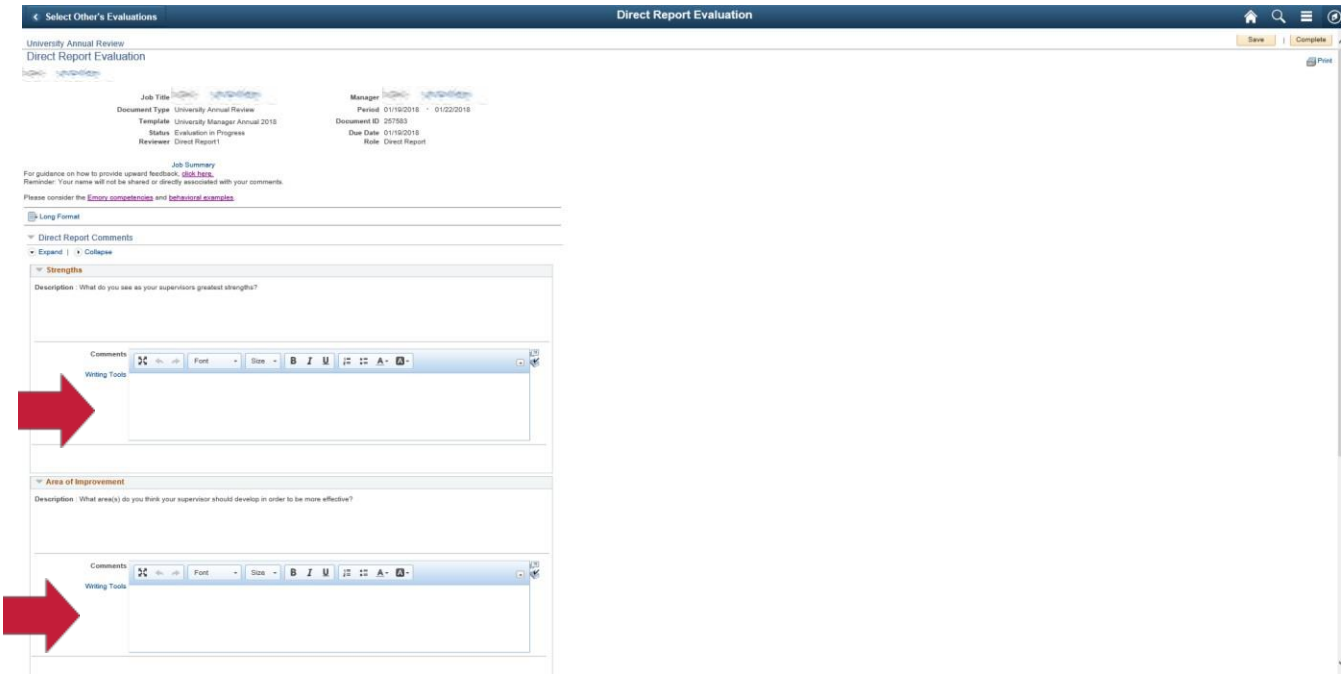
8) You will see the “Direct Report Evaluation” with the name of the supervisor you selected.



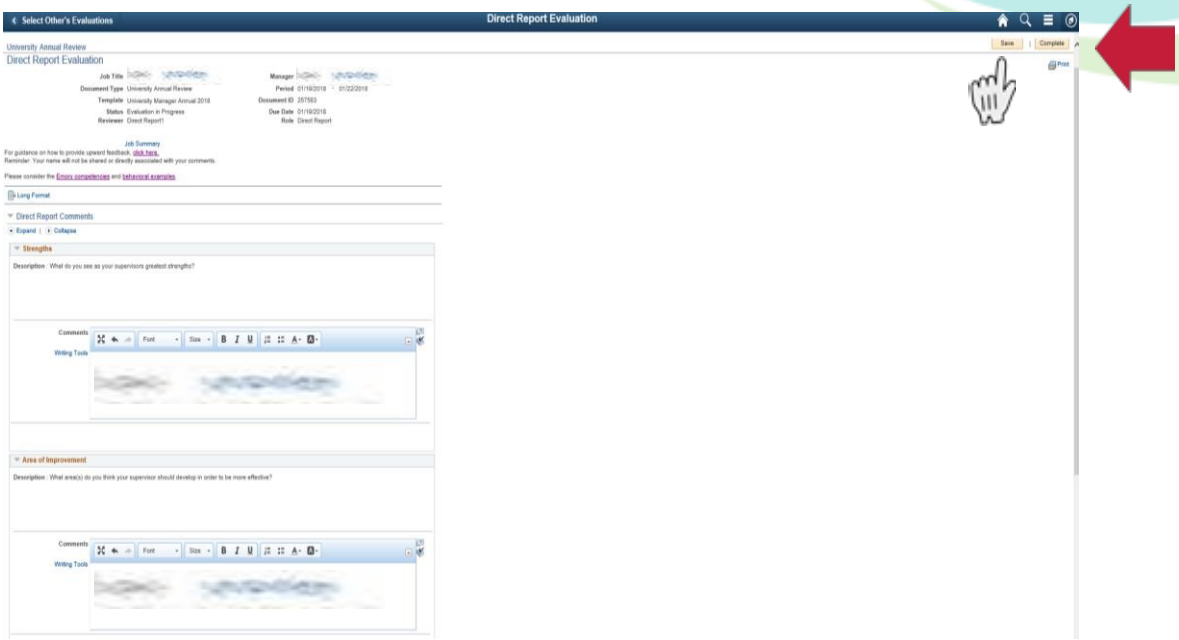
9) Click on the arrow to expand the comment boxes to write feedback.



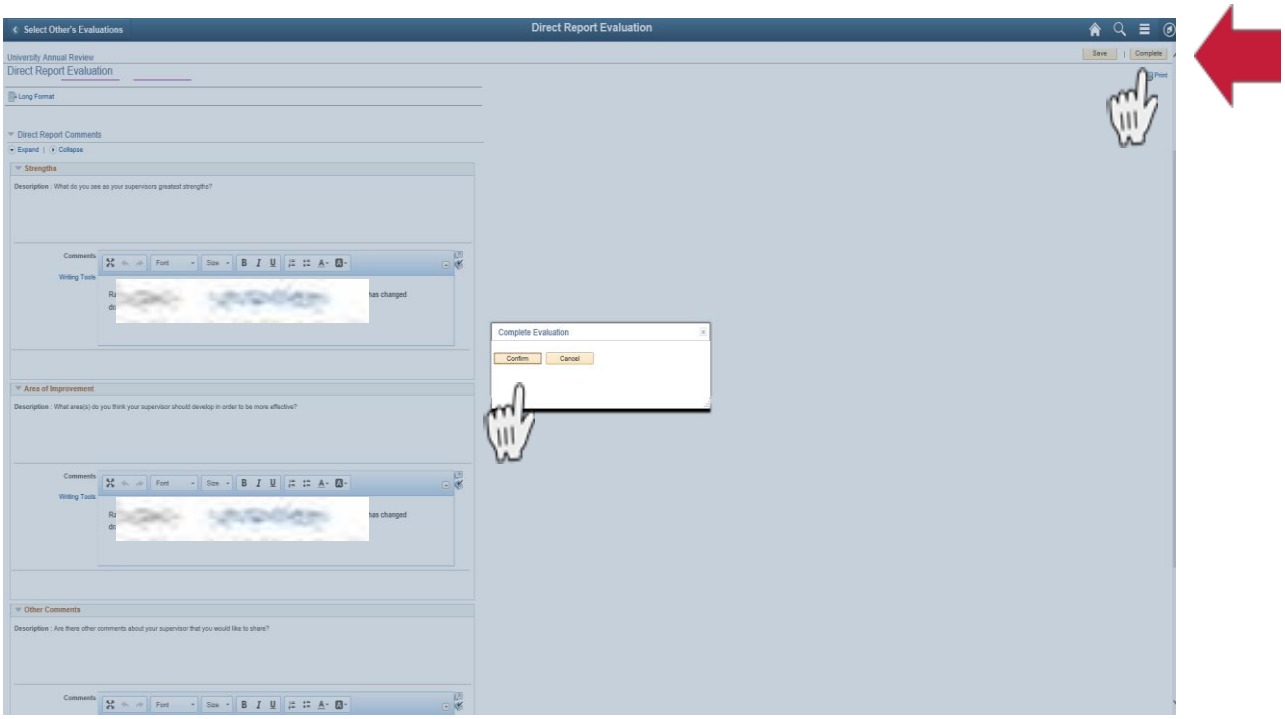
10) Add your supervisor feedback to each comment box.



11) When you have completed each comment box with feedback, click “Save.”



12) When you are ready to submit upward feedback, click “Complete” and then “Confirm.”



13) You will receive a confirmation that the Upward Feedback has been completed.