

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

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Performance Management User Guide 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.

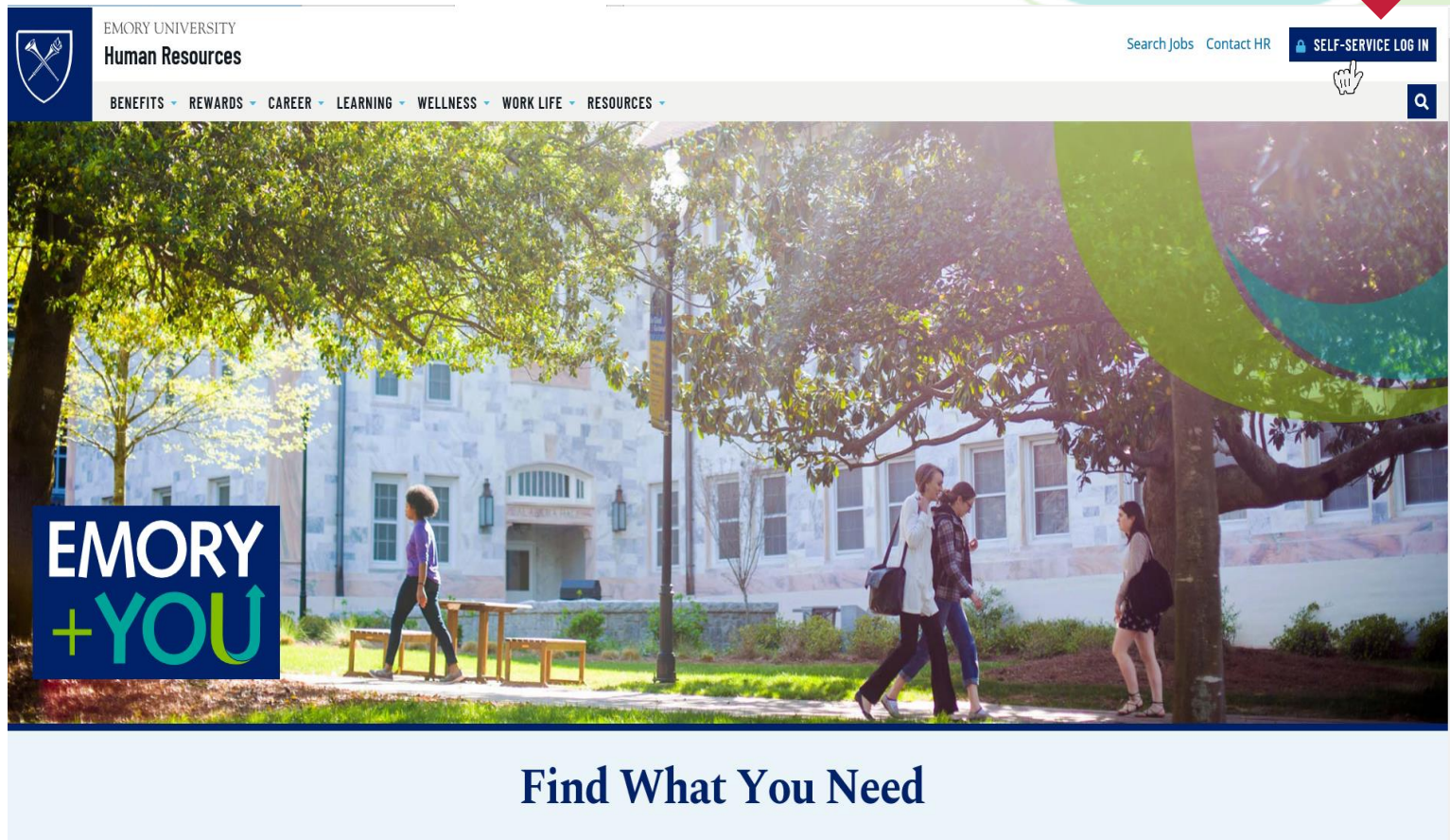
Performance Management User Guide

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

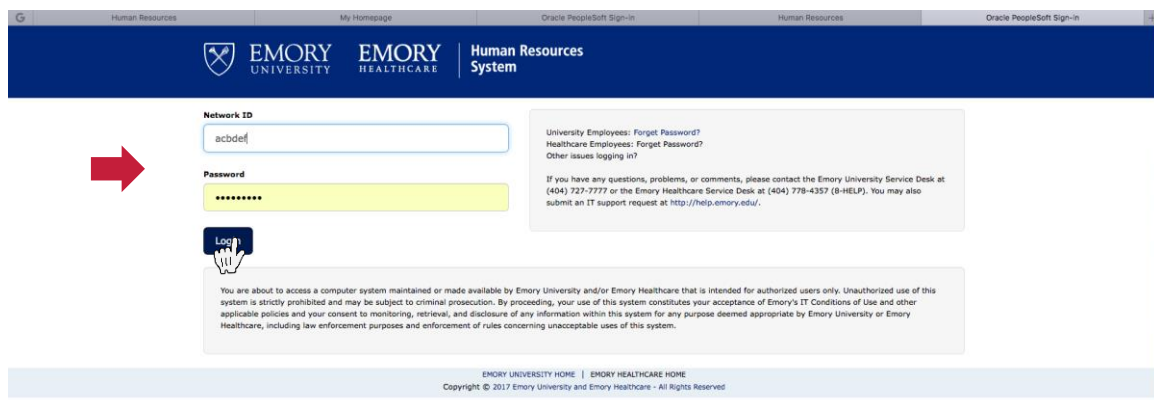
The first step of the performance management process in PeopleSoft 9.2 is called the “Start” step. Here you will add your own goals, new competencies and additional responsibilities for use in driving feedback and evaluation throughout the year. This is an opportunity for you and your manager to determine 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."



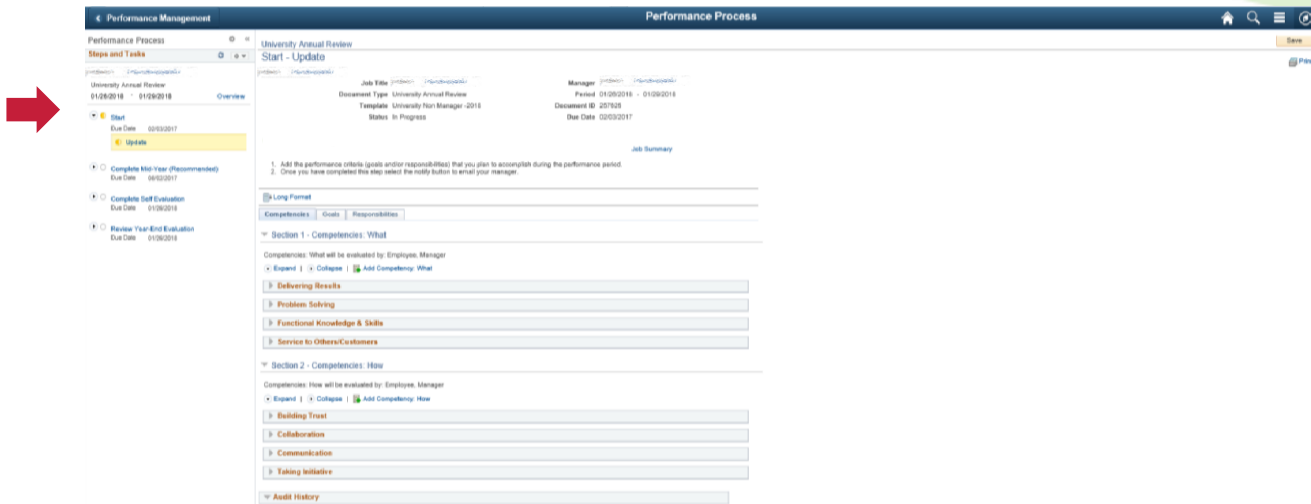
2) Type in your user name (Network ID) and password.



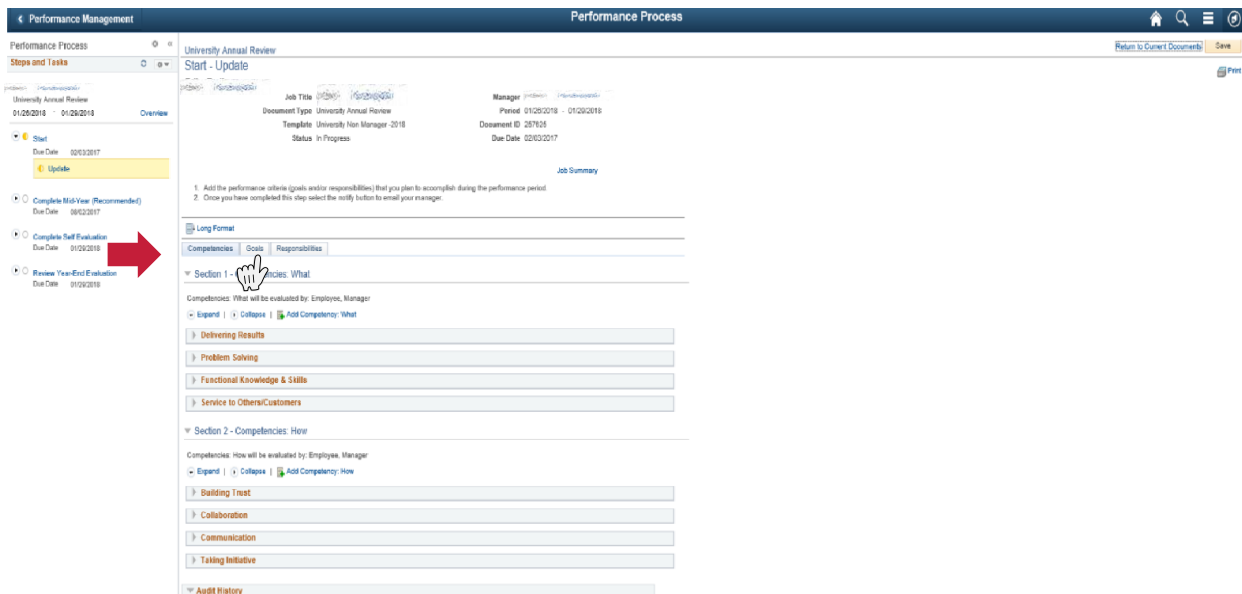
3) Once you are in Self- Service, select the “Performance Management” tile.



- 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.

Performance Management Performance Process

University Annual Review

Start - Update

Job Title: [User] Manager: [User]

Document Type: University Annual Review Period: 01/26/2018 - 01/26/2018

Template: University Non Manager -2018 Document ID: 257625

Status: In Progress Due Date: 02/03/2017

Job Summary

1. Add the performance criteria (goals and/or responsibilities) that you plan to accomplish during the performance period.
2. Once you have completed this step select the notify button to email your manager.

Long Format

Competencies Goals Responsibilities

Section 3 - Employee Goals (Optional)

Employee Goals (Optional) will be evaluated by: Employee, Manager

Expand Collapse Add Goal

Goal 1: eat your wheatees

Description: [User] [User]

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.

Performance Management Performance Process

University Annual Review

Start - Update

Job Title: [User] Manager: [User]

Document Type: University Annual Review Period: 01/26/2018 - 01/26/2018

Template: University Non Manager -2018 Document ID: 257625

Status: In Progress Due Date: 02/03/2017

Job Summary

You have successfully saved this document.

1. Add the performance criteria (goals and/or responsibilities) that you plan to accomplish during the performance period.
2. Once you have completed this step select the notify button to email your manager.

Long Format

Competencies Goals Responsibilities

Section 1 - Competencies

Competencies: What will be evaluated by: Employee, Manager

Expand Collapse Add Competency What

Delivering Results

Problem Solving

Functional Knowledge & Skills

Service to Others/Customers

Section 2 - Competencies: How

Competencies: How will be evaluated by: Employee, Manager

Expand Collapse Add Competency How

Building Trust

Collaboration

Communication

Taking Initiative

Audit History

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


The screenshot shows the 'Performance Process' interface. On the left, there's a sidebar with 'Steps and Tasks' including 'Start', 'Update', 'Complete Mid-Year (Recommended)', 'Complete Self Evaluation', and 'Review Year-End Evaluation'. The main area is titled 'Add Your Own Responsibility' and contains a text box with the description 'I am responsible for tracking all of the Birkenman tracking.' Below the text box is an 'Add' button. A red arrow points to the 'Add' button. There is also a 'Notify' button with a hand icon.

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

The screenshot shows the 'Performance Management' interface. The top bar includes 'Performance Process' and a 'Save' button. The main area is titled 'Start - Update' and contains a form with fields for 'Job Title', 'Manager', 'Document Type', 'Template', 'Status', 'Period', 'Document ID', and 'Due Date'. Below the form, there are sections for 'Competencies' and 'Responsibilities'. A red arrow points to the 'Save' button in the top right corner.

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>

Your Criteria has been finalized for this year's performance management document.

Do_Not_Reply@emory.edu

 This item is expired.
You forwarded this message on 11/30/2017 12:25 PM.

Sent: Tue 11/28/2017 4:28 PM

To: jpb@leo.cc.emory.edu

Retention Policy: Deleted Items (1 week) Expires: 12/5/2017

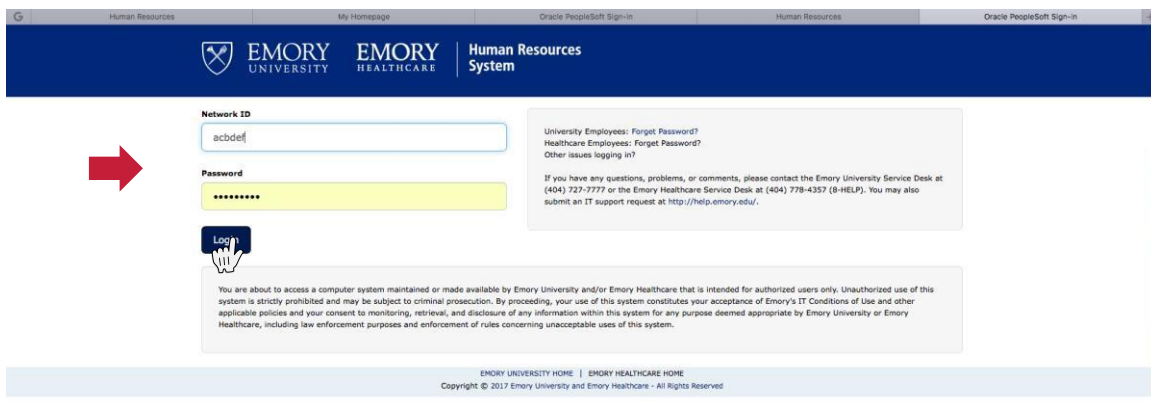
Your criteria (competencies, goals, and/or responsibilities) have been finalized for this year's performance management documents.

Please review using the following link and navigation:

<https://leo.cc.emory.edu>

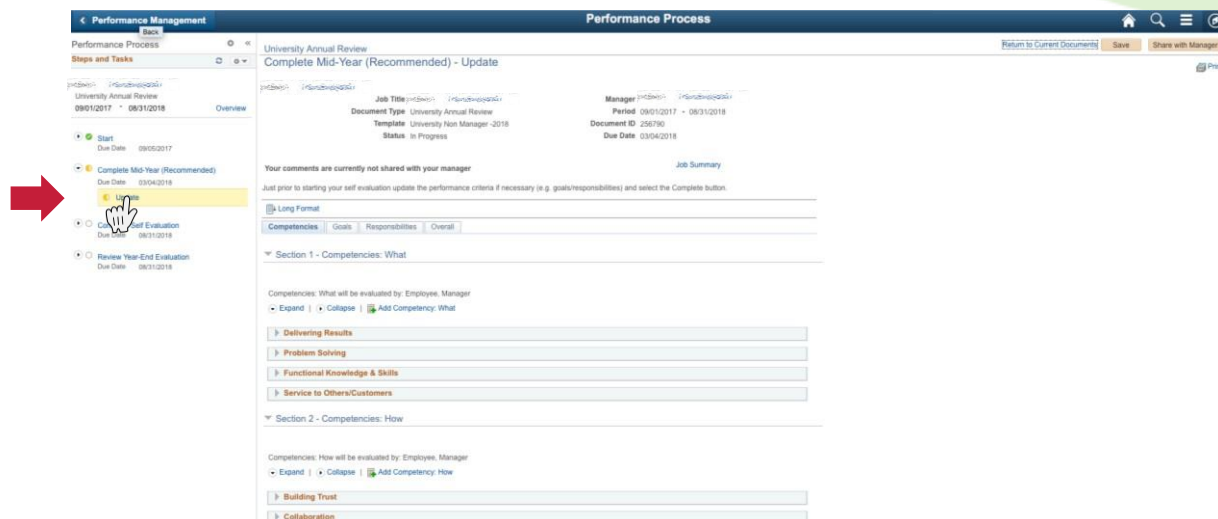
Navigate to Self Service > Performance Management > My Current Documents

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



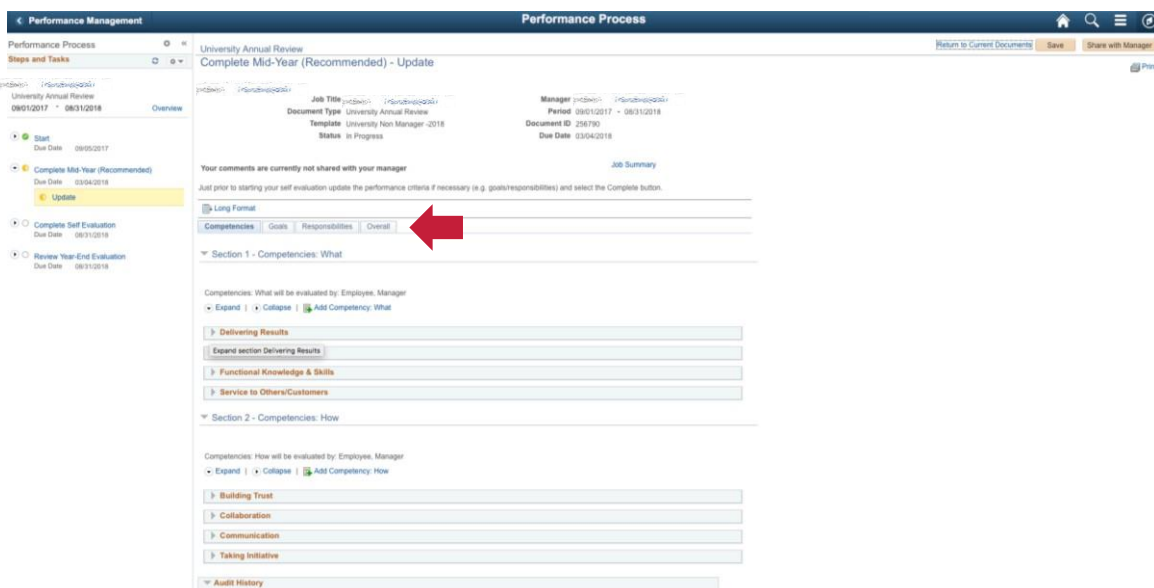


5) Below “Complete Mid-Year Review,” select “Update.”



The screenshot shows the 'Performance Management' interface. On the left, under 'Steps and Tasks', the 'Complete Mid-Year (Recommended)' step is highlighted, and the 'Update' button is visible. The main content area shows the 'Complete Mid-Year (Recommended) - Update' form. The form includes fields for 'Job Title', 'Manager', 'Document Type', 'Template', 'Status', 'Period', 'Document ID', and 'Due Date'. Below these fields, there are tabs for 'Competencies', 'Goals', 'Responsibilities', and 'Overall'. The 'Competencies' tab is selected, showing 'Section 1 - Competencies: What' and 'Section 2 - Competencies: How'. Each section has a list of competencies to be evaluated, with options to 'Expand', 'Collapse', and 'Add Competency'.

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.



The screenshot shows the 'Performance Management' interface. On the left, under 'Steps and Tasks', the 'Complete Mid-Year (Recommended)' step is highlighted, and the 'Update' button is visible. The main content area shows the 'Complete Mid-Year (Recommended) - Update' form. The form includes fields for 'Job Title', 'Manager', 'Document Type', 'Template', 'Status', 'Period', 'Document ID', and 'Due Date'. Below these fields, there are tabs for 'Competencies', 'Goals', 'Responsibilities', and 'Overall'. The 'Competencies' tab is selected, showing 'Section 1 - Competencies: What' and 'Section 2 - Competencies: How'. Each section has a list of competencies to be evaluated, with options to 'Expand', 'Collapse', and 'Add Competency'.

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

The screenshot shows the 'Performance Management' interface. On the left, a sidebar lists 'Steps and Tasks' including 'Start', 'Complete Mid-Year (Recommended)', 'Complete Self Evaluation', and 'Review Year-End Evaluation'. The main area is titled 'Complete Mid-Year (Recommended) - Update'. It displays job information (Job Title, Document Type, Template, Status) and manager information (Manager, Period, Document ID, Due Date). Below this, there's a section for 'Your comments are currently not shared with your manager' and a 'Job Summary' link. The 'Long Format' section is active, showing 'Competencies' tabs. Under 'Section 1 - Competencies: What', there's a list of competencies: 'Delivering Results', 'Functional Knowledge & Skills', and 'Service to Others/Customers'. A red arrow points to the 'Expand' button next to 'Delivering Results'.

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

This screenshot shows the same 'Performance Management' interface as the previous one, but with more detail. The 'Delivering Results' competency is expanded, showing its description: 'PRODUCTIVITY: Strives to consistently achieve excellence in all tasks and goals. Maintains focus and perseveres in the face of obstacles. Uses time efficiently and responds quickly and constructively when confronted with challenges. Prioritizes tasks based on importance. PERSONAL GROWTH: Ensures job knowledge and skills are current and valuable. Responsive to feedback.' Below the description, there's a 'Manager Comments' section with a text area containing the text: 'Taylor processed all 360 evaluations ahead of schedule for the Fall Emerging Leaders program. Taylor also delivered the Birken feedback session and had them prepared well in advance of the training sessions.' Below that is the 'Employee Comments' section, which has a text area with the text: 'Completed all 360s for Emerging Leaders'. A red arrow points to this text area. At the bottom, there's a 'Created By, Template' section with the value '11/09/2017 9:35AM'.

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

The screenshot shows the 'Performance Process' interface. On the left, a sidebar lists the performance process steps: Start, Complete Mid-Year (Recommended), Update, Complete Self Evaluation, and Review Year-End Evaluation. The 'Update' step is currently active. The main content area is titled 'Complete Mid-Year (Recommended) - Update'. It displays a 'Long Format' view with tabs for 'Competencies', 'Goals', 'Responsibilities', and 'Overall'. The 'Goals' tab is selected, and a red arrow points to it. Below the tabs, there is a section titled 'Section 3 - Employee Goals (Optional)' with a dropdown menu to expand or collapse it. A red arrow points to the 'Expand' button. Below this, there is a list of goals, with the first goal being 'Goal 1: Certification as HR Rep II'. A red arrow points to the 'Add Goal' button.

10) Click the drop down to expand your goals.

This screenshot is similar to the previous one, but the 'Section 3 - Employee Goals (Optional)' dropdown menu is now expanded, showing the list of goals. A red arrow points to the 'Expand' button, and another red arrow points to the 'Add Goal' button. The goal list includes 'Goal 1: Certification as HR Rep II'.

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

The screenshot shows the 'Performance Process' interface for a 'University Annual Review'. The left sidebar lists steps: Start, Complete Mid-Year (Recommended), Complete Self Evaluation, and Review Year-End Evaluation. The main content area is titled 'Complete Mid-Year (Recommended) - Update'. It displays document details: Job Title (University Annual Review), Document Type (University Non Manager -2018), Template (University Non Manager -2018), Status (In Progress), Manager (University Non Manager -2018), Period (09/01/2017 - 08/31/2018), Document ID (256790), and Due Date (03/04/2018). Below this, there's a section for 'Your comments are currently not shared with your manager'. A red arrow points to the 'Manager Comments' text area, which contains the text: 'Taylor processed all 360 evaluations ahead of schedule for the Fall Emerging Leaders program. Taylor also delivered the Birken feedback session and had them prepared well in advance of the training sessions.' Below this is the 'Employee Comments' text area, which contains the text: 'Completed all 360s for Emerging Leaders'.

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

The screenshot shows the same 'Performance Process' interface. The 'Manager Comments' and 'Employee Comments' sections are visible. A red arrow points to the 'Responsibilities' tab in the 'Long Format' section. The 'Responsibilities' tab is selected, and the content area shows 'Section 4 - Responsibilities (Optional)'. Below this, there's a section for 'Responsibilities (Optional) will be evaluated by Employee, Manager'. A red arrow points to the 'Add Responsibility' button. Below this, there's a section for 'Responsibility 1: Coaching'.

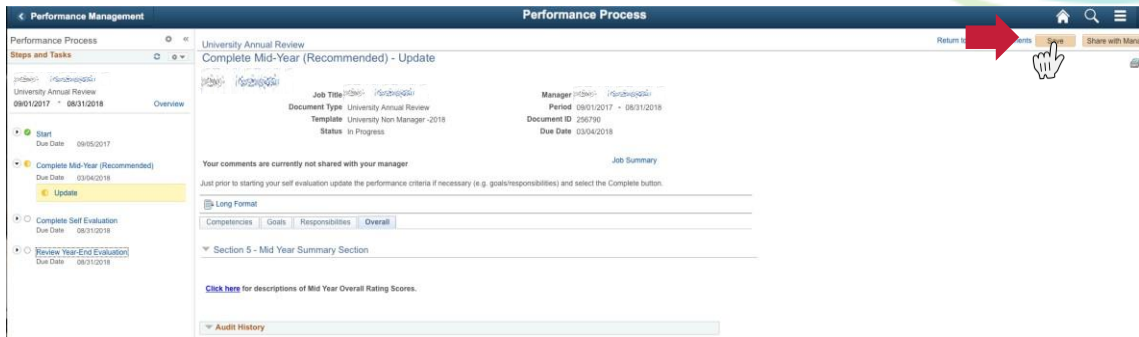
13) Click on the drop down tab to view each of your responsibilities.

The screenshot shows the 'Performance Process' interface for 'University Annual Review'. The main section is 'Complete Mid-Year (Recommended) - Update'. On the left, a 'Steps and Tasks' sidebar lists: Start (09/05/2017), Complete Mid-Year (Recommended) (09/04/2018), Complete Self Evaluation (08/31/2018), and Review Year-End Evaluation (08/31/2018). The 'Complete Mid-Year (Recommended)' step is selected. The main content area shows a form for 'Jonathan Koestler' (Job Title: Orgl Dev Consultant, Manager: Randall Ludus, Period: 08/01/2017 - 08/31/2018, Document ID: 256790, Due Date: 03/04/2018). The form has tabs for 'Competencies', 'Goals', 'Responsibilities', and 'Overall'. The 'Responsibilities' tab is active, showing 'Section 4 - Responsibilities (Optional)'. A red arrow points to the 'Responsibilities' tab. Below the section header, it says 'Responsibilities (Optional) will be evaluated by: Employee, Manager'. There are buttons for 'Expand', 'Collapse', and 'Add Responsibility'. A 'Responsibility 1: Coaching' is listed with a description: 'Provides individualized coaching over a sustained period of time (3-6 months) to help improve leadership and workplace effectiveness.' Below this, there are text boxes for 'Manager Comments' and 'Employee Comments'.

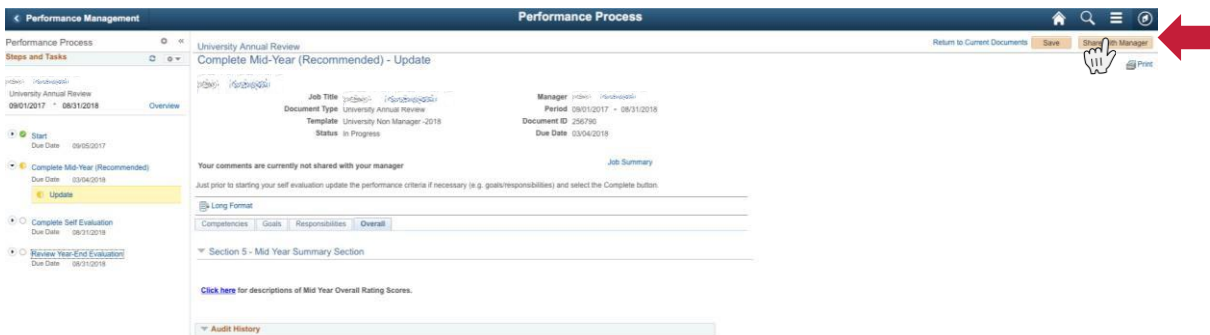
14) Document how have you fulfilled your responsibilities.

This screenshot shows the same 'Performance Management' interface as the previous one, but with the 'Responsibilities' tab selected and expanded. The 'Section 4 - Responsibilities (Optional)' section is now visible, showing 'Responsibility 1: Coaching'. The description for this responsibility is 'Provides individualized coaching over a sustained period of time (3-6 months) to help improve leadership and workplace effectiveness.' Below the description, there are two text boxes: 'Manager Comments' and 'Employee Comments'. The 'Manager Comments' box contains the text: 'Taylor provided coaching to two individuals so far this year. Both individuals seem pleased and continue to seek Taylor's assistance.' The 'Employee Comments' box contains the text: 'Provide ongoing feedback with Emerging participants.'

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."

The screenshot shows the 'Performance Process' interface. On the left, a sidebar lists steps: Start, Complete Mid-Year (Recommended), Complete Self Evaluation, and Review Year-End Evaluation. The 'Complete Mid-Year (Recommended)' step is selected, showing a due date of 03/04/2018. The main area displays 'University Annual Review' details, including 'Document Type: University Annual Review', 'Template: University Non Manager -2018', and 'Status: In Progress'. A 'Share Comments' dialog box is open, asking 'Select confirm to share your comments with your manager.' with 'Confirm' and 'Cancel' buttons. A red arrow points to the 'Confirm' button.

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.

Performance Management User Guide

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?

- 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


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>.

Your Criteria has been finalized for this year's performance management document.

Do_Not_Reply@emory.edu

 This item is expired.
You forwarded this message on 11/30/2017 12:25 PM.

Sent: Tue 11/28/2017 4:28 PM

To:  

Retention Policy: Deleted Items (1 week) Expires: 12/5/2017

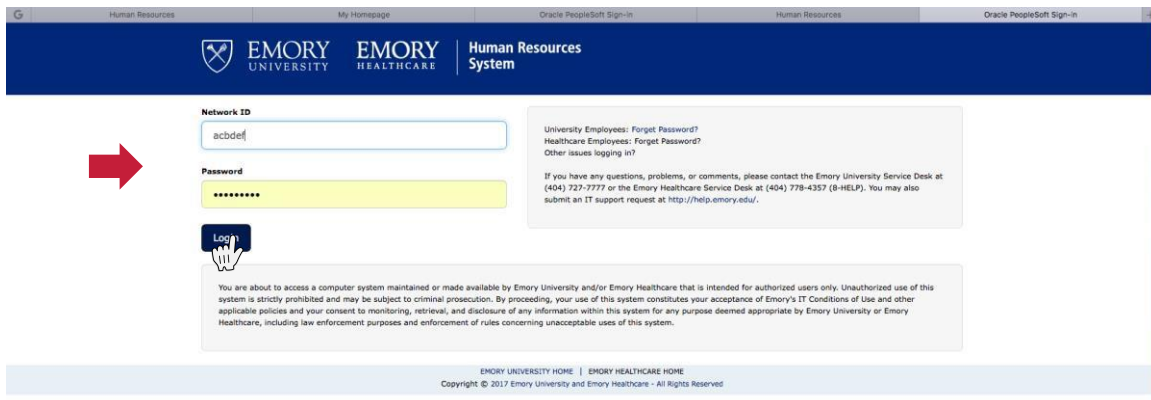
Your criteria (competencies, goals, and/or responsibilities) have been finalized for this year's performance management documents.

Please review using the following link and navigation:

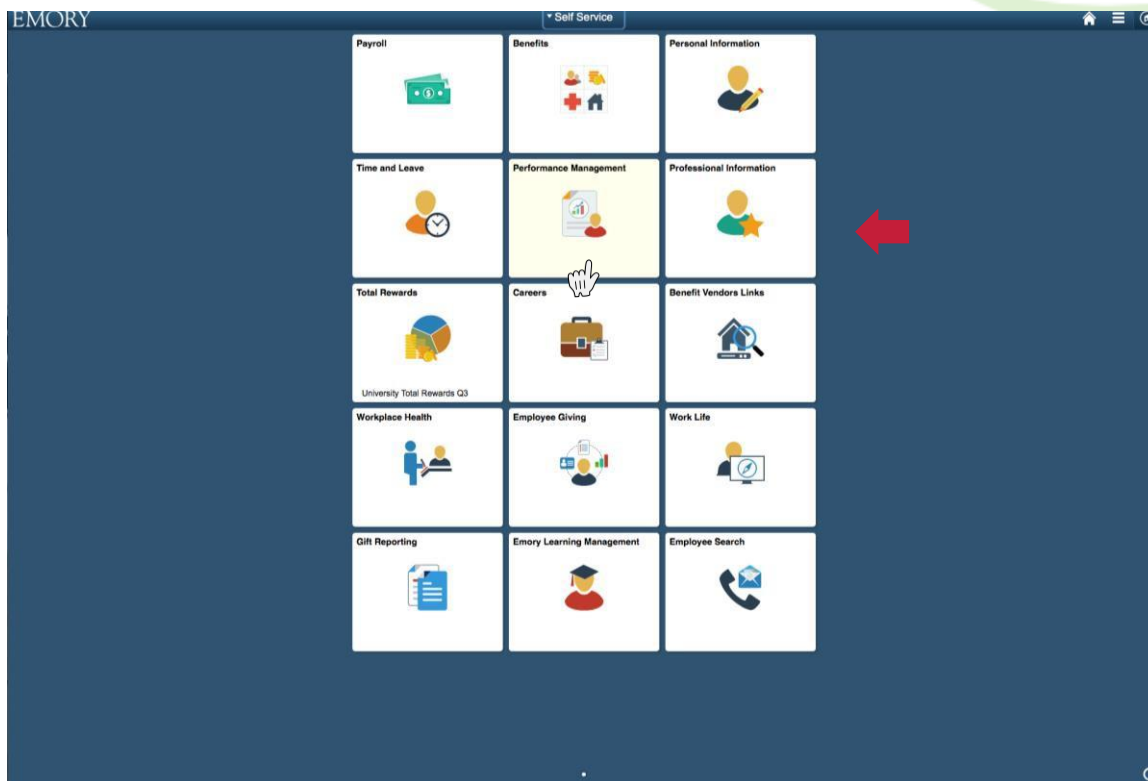
<https://leo.cc.emory.edu>

Navigation: Self Service > Performance Management > My Current Documents

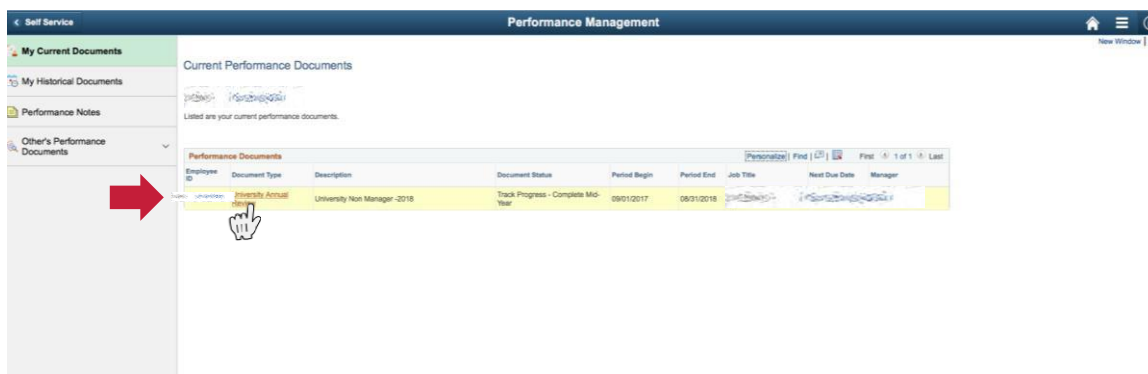
- 2) Type in your user name (Network ID) and password.



3) Click on the “Performance Management” tile.



4) Click on your “University Annual Review.”



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

The screenshot shows the 'Performance Process' interface. On the left, the 'Steps and Tasks' sidebar lists several steps: 'Start', 'Complete Mid-Year (Recommended)', 'Complete Self Evaluation', 'Update and Complete' (highlighted with a red arrow), and 'Review Year-End Evaluation'. The main content area is titled 'Self-Evaluation - Update and Complete'. It displays document details: Job Title (University Manager Annual Review), Document Type (University Manager Annual Review), Template (Evaluation in Progress), Status (Evaluation in Progress), Job Summary, Manager (11/28/2017 - 08/31/2018), Period (11/28/2017 - 08/31/2018), Document ID (256839), and Due Date (08/31/2018). Below this, there are tabs for 'Competencies', 'Goals', and 'Responsibilities'. The 'Competencies' tab is active, showing a list of competencies: 'Delivering Results', 'Problem Solving', 'Functional Knowledge & Skills', and 'Service to Others/Customers'. There are also sections for 'Competencies: What' and 'Competencies: How' with expand/collapse buttons and an 'Add Competency' button.

6) Here you will see the main screen of your performance document. You can navigate with the tabs for Competencies, Goals, and Responsibilities.

This screenshot shows the same 'Performance Process' interface as the previous one, but with the 'Update and Complete' step completed. The 'Competencies' tab is now selected, and the 'Goals' and 'Responsibilities' tabs are visible. The 'Competencies' section shows a list of competencies: 'Delivering Results', 'Problem Solving', 'Functional Knowledge & Skills', and 'Service to Others/Customers'. There are also sections for 'Competencies: What' and 'Competencies: How' with expand/collapse buttons and an 'Add Competency' button. At the bottom, there is an 'Attachments' section with a message 'No Attachments have been added to this document' and an 'Add Attachment' button. An 'Audit History' section is also visible at the bottom.

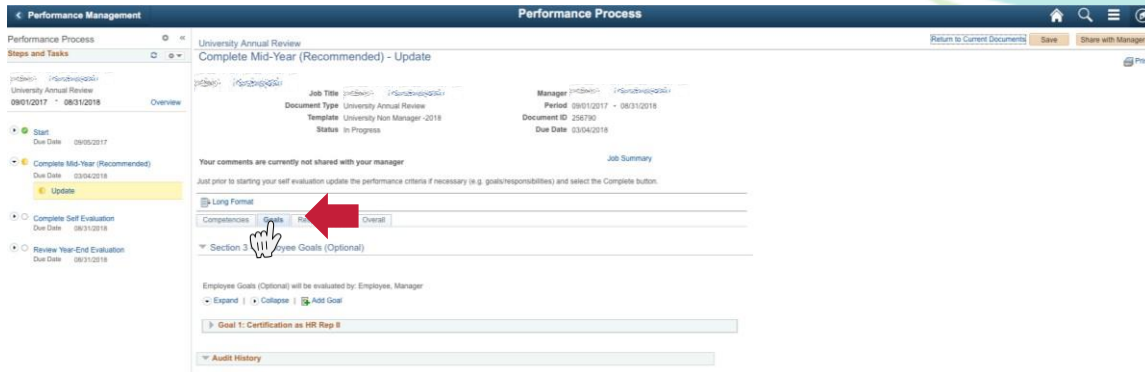
7) To expand each of the competencies, click on the drop down icon.

The screenshot shows the 'Performance Process' interface for a 'University Annual Review'. The left sidebar lists steps: Start, Complete Mid-Year (Recommended), Complete Self Evaluation, Update and Complete (highlighted), and Review Year-End Evaluation. The main area is titled 'Self-Evaluation - Update and Complete'. It displays fields for Job Title, Document Type, Template, Status, Manager, Period, Document ID, and Due Date. Below these, there are tabs for 'Competencies', 'Goals', and 'Responsibilities'. Under 'Competencies: What', there is a list of competencies: 'Delivering Results', 'Problem Solving', 'Functional Knowledge & Skills', and 'Service to Others/Customers'. A red arrow points to the 'Expand' button next to 'Delivering Results'.

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

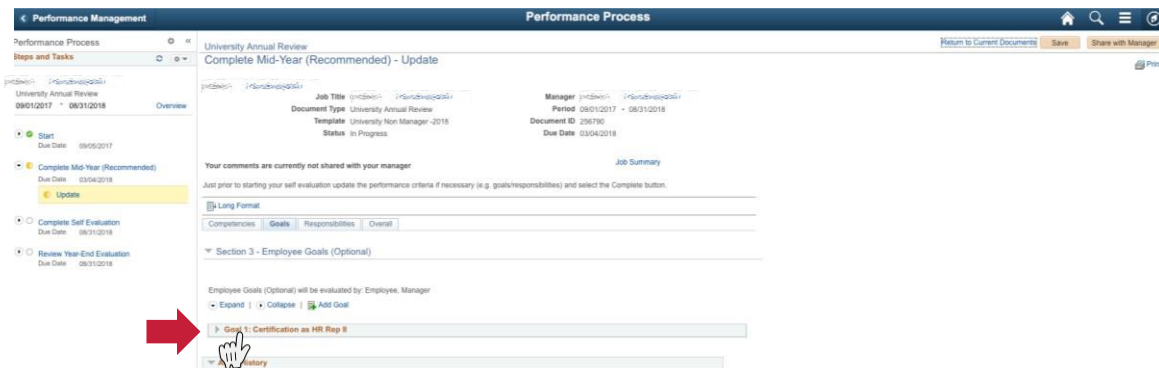
This screenshot shows the 'Employee Comments' section for the 'Delivering Results' competency. It includes a description of the competency, a list of 'Meets Expectations Behaviors Examples', and a text input area for the employee's comments. A red arrow points to the text input area, which contains the text 'I think I am great.'.

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



The screenshot shows the 'Performance Process' interface. On the left, a sidebar lists the 'Steps and Tasks' of the 'University Annual Review' process, including 'Start', 'Complete Mid-Year (Recommended)', 'Update', 'Complete Self Evaluation', and 'Review Year-End Evaluation'. The 'Update' step is currently active. The main content area is titled 'Complete Mid-Year (Recommended) - Update'. It displays a 'Long Format' view with tabs for 'Competencies', 'Goals', 'Responsibilities', and 'Overall'. The 'Goals' tab is selected, and a red arrow points to it. Below the tabs, there is a section titled 'Section 3 - Employee Goals (Optional)' with a dropdown menu set to 'Expand'. A red arrow points to the 'Expand' dropdown. Below this, there is a list of goals, with the first goal being 'Goal 1: Certification as HR Rep II'. A red arrow points to the 'Add Goal' button.

10) Click the drop down to expand your goals.



The screenshot shows the 'Performance Process' interface, similar to the previous one, but with the 'Goals' tab expanded. The 'Section 3 - Employee Goals (Optional)' dropdown menu is now set to 'Collapse'. A red arrow points to the 'Collapse' dropdown. Below this, the list of goals is visible, with the first goal being 'Goal 1: Certification as HR Rep II'. A red arrow points to the 'Add Goal' button.

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

The screenshot shows the 'Performance Process' web application. The main heading is 'Complete Mid-Year (Recommended) - Update'. Below this, there are fields for 'Job Title', 'Manager', 'Document Type', 'Template', 'Status', 'Period', 'Document ID', and 'Due Date'. A section titled 'Your comments are currently not shared with your manager' includes a 'Job Summary' link and a note about updating performance criteria. Below this is a 'Long Format' section with tabs for 'Competencies', 'Goals', 'Responsibilities', and 'Overall'. The 'Competencies' tab is selected, showing a list of competencies. A red arrow points to the 'Employee Comments' text area, which contains the text: 'Completed all 360s for Emerging Leaders'.

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

The screenshot shows the 'Performance Process' web application. The main heading is 'Complete Mid-Year (Recommended) - Update'. Below this, there are fields for 'Job Title', 'Manager', 'Document Type', 'Template', 'Status', 'Period', 'Document ID', and 'Due Date'. A section titled 'Your comments are currently not shared with your manager' includes a 'Job Summary' link and a note about updating performance criteria. Below this is a 'Long Format' section with tabs for 'Competencies', 'Goals', 'Responsibilities', and 'Overall'. The 'Responsibilities' tab is selected, showing a list of responsibilities. A red arrow points to the 'Responsibilities' tab.

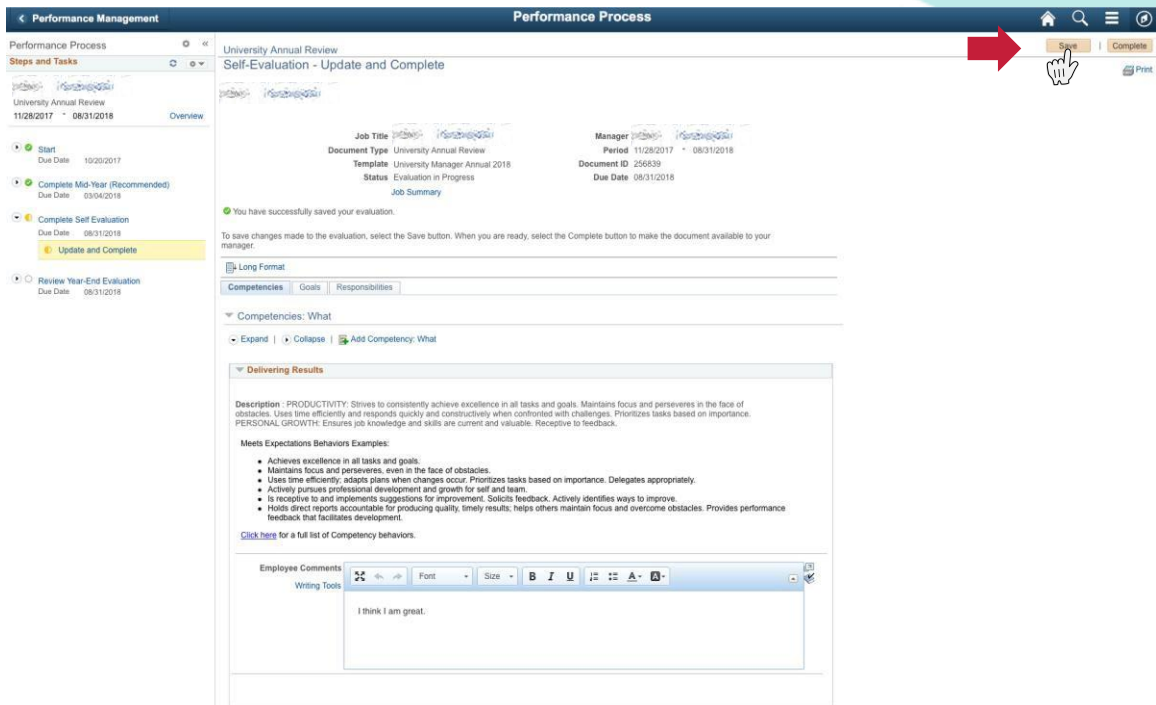
13) Click on the drop down tab to view each of your responsibilities.

The screenshot shows the 'Performance Process' web application. The main content area is titled 'Complete Mid-Year (Recommended) - Update'. On the left, there is a sidebar with a 'Steps and Tasks' section. A red arrow points to the 'Responsibilities' tab in this sidebar. The main content area displays a form for updating performance criteria, including fields for Job Title, Document Type, Manager, Period, Document ID, and Due Date. Below these fields, there is a section for 'Section 4 - Responsibilities (Optional)' with a dropdown menu for 'Responsibilities (Optional)' and a button to 'Add Responsibility'.

14) Document how have you fulfilled your responsibilities.

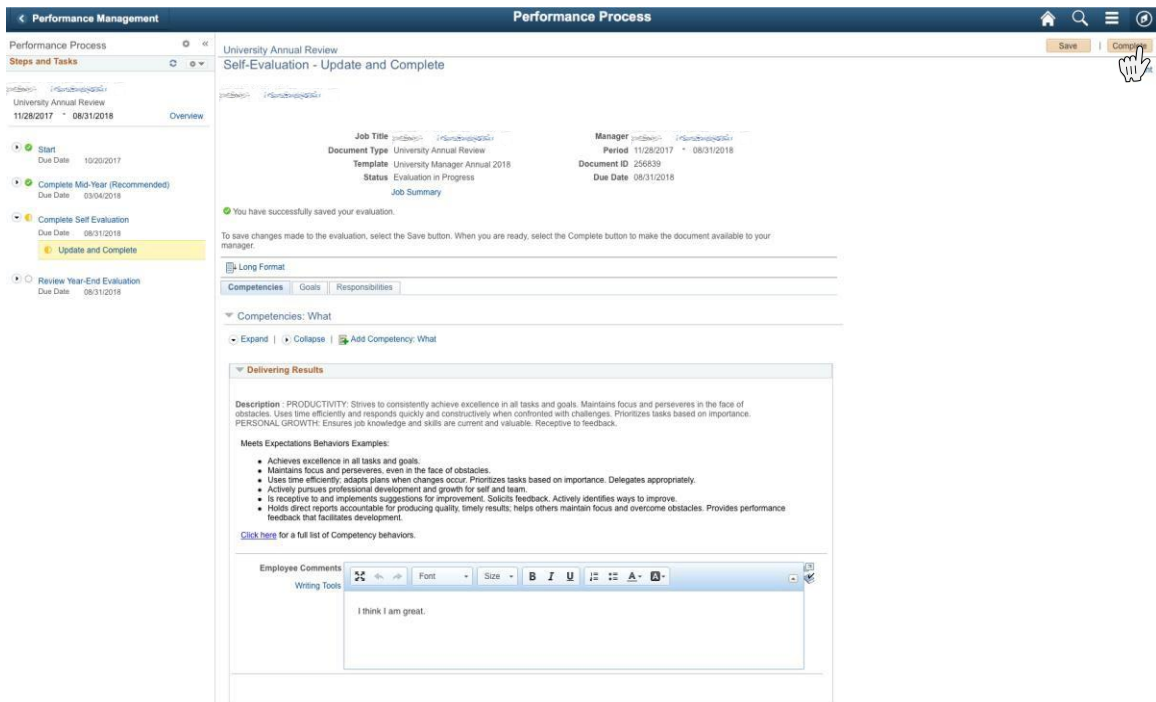
The screenshot shows the 'Performance Process' web application. The main content area is titled 'Complete Mid-Year (Recommended) - Update'. On the left, there is a sidebar with a 'Steps and Tasks' section. A red arrow points to the 'Employee Comments' text area in the 'Responsibilities' section. The main content area displays a form for updating performance criteria, including fields for Job Title, Document Type, Manager, Period, Document ID, and Due Date. Below these fields, there is a section for 'Section 4 - Responsibilities (Optional)' with a dropdown menu for 'Responsibilities (Optional)' and a button to 'Add Responsibility'. The 'Responsibility 1: Coaching' section is expanded, showing a description and a text area for 'Employee Comments'.

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



The screenshot shows the 'Performance Process' interface. On the left, a 'Steps and Tasks' sidebar lists the process stages: Start, Complete Mid-Year (Recommended), Complete Self Evaluation, Update and Complete (highlighted), and Review Year-End Evaluation. The main content area is titled 'Self-Evaluation - Update and Complete'. It displays a confirmation message: 'You have successfully saved your evaluation.' Below this, it instructs the user to save changes and then click 'Complete' to make the document available to their manager. The interface includes tabs for 'Competencies', 'Goals', and 'Responsibilities'. The 'Competencies' section is expanded, showing a list of behaviors under 'Delivering Results'. At the bottom, there is a text area for 'Employee Comments' with a rich text editor toolbar. A red arrow points to the 'Save' button in the top right corner of the main content area.

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



This screenshot is identical to the previous one, showing the 'Self-Evaluation - Update and Complete' screen. However, a red arrow now points to the 'Complete' button in the top right corner of the main content area, indicating the next step in the process.

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

The screenshot displays the 'Performance Process' interface for a 'University Annual Review'. The left sidebar shows the 'Steps and Tasks' list, with 'Update and Complete' highlighted. The main content area shows the 'Self-Evaluation - Update and Complete' form. A 'Complete Evaluation' dialog box is open, prompting the user to confirm completion. The dialog has 'Confirm' and 'Cancel' buttons. A red arrow points to the 'Confirm' button. The background form includes fields for Job Title, Manager, Document Type, Template, Status, and Due Date. It also has tabs for Competencies, Goals, and Responsibilities. The 'Competencies' tab is active, showing a list of competencies and a section for 'Delivering Results' with a description and examples. At the bottom, there is a text area for 'Employee Comments' with the text 'I think I am great.'

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:

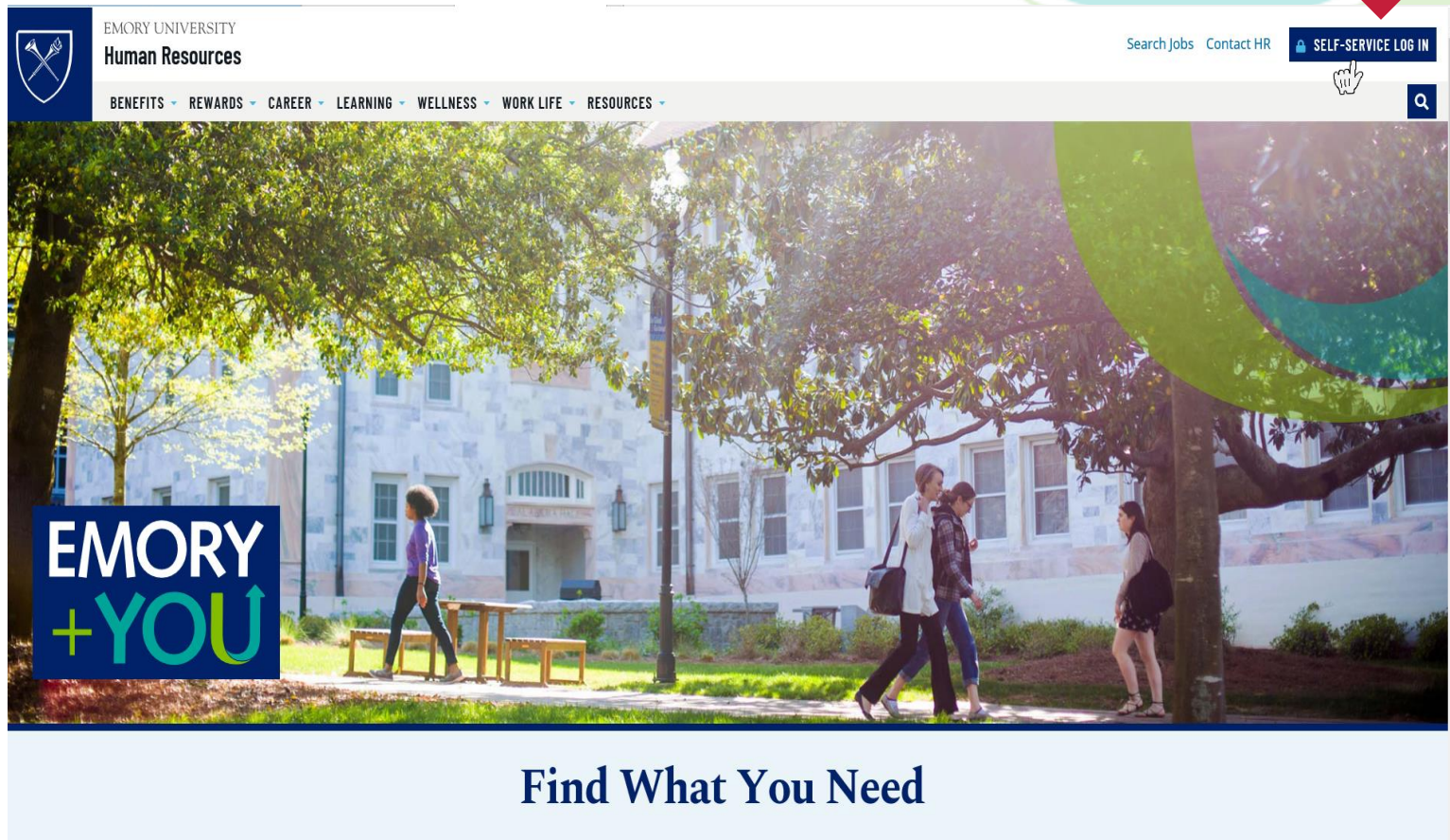
1. What do you see as your supervisor's greatest strengths?
2. What area(s) do you think your supervisor should develop in order to be more effective?
3. Are there other comments about your supervisor that you would like to share?

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.

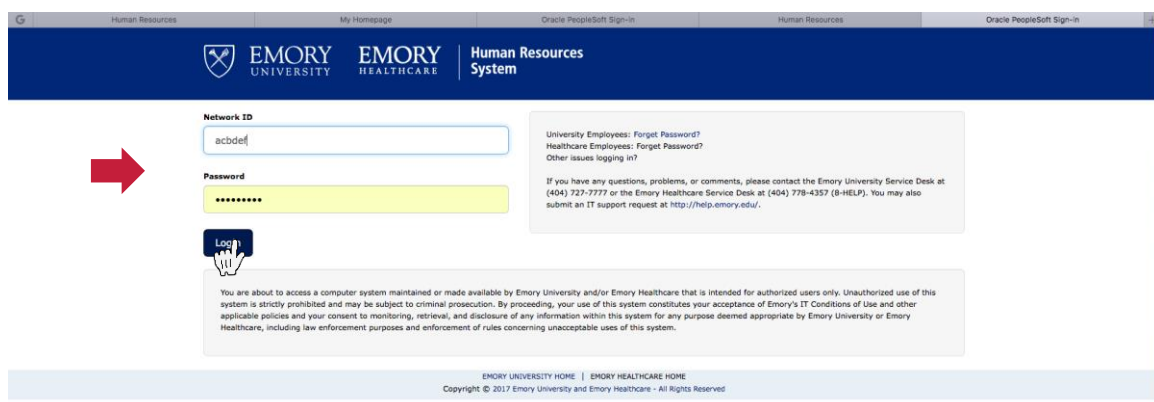
How to write comments: When responding to these questions, it is easy to reflect on only your most recent interactions with your supervisor, but it is best to think collectively of your supervisor's behavior throughout the year. Reflect on strengths and any areas that can help them improve. If you have 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.

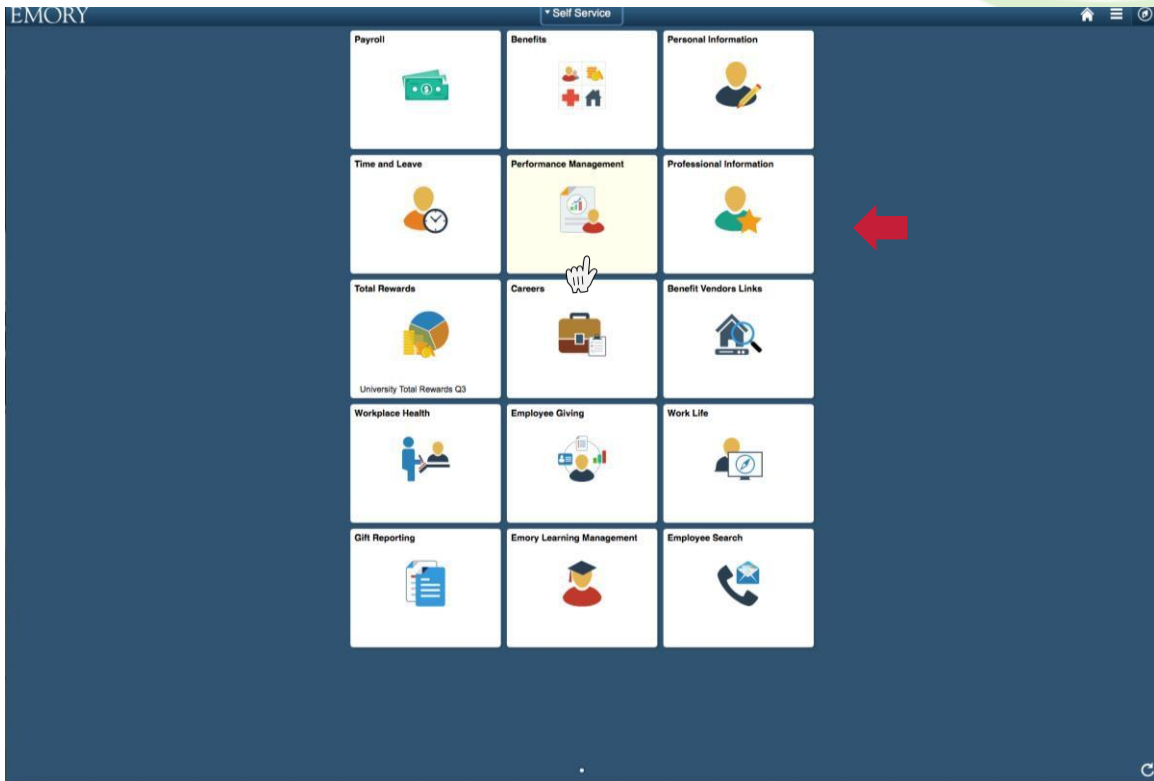
1) Begin by going to the Human Resources page (www.hr.emory.edu) and selecting "Self-Service Login."



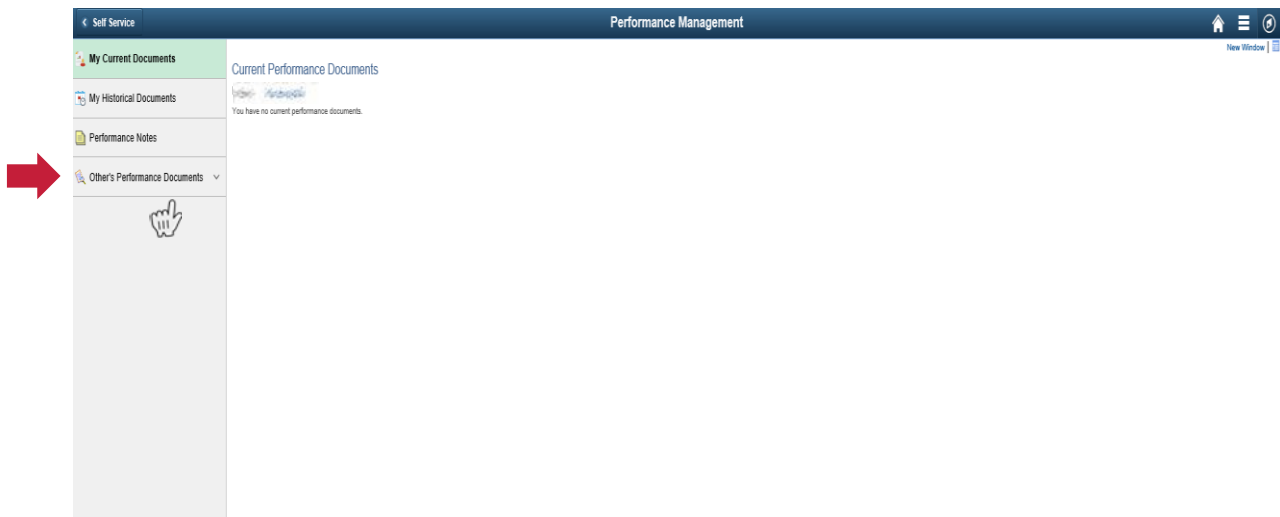
2) Type in your user name (Network ID) and password.



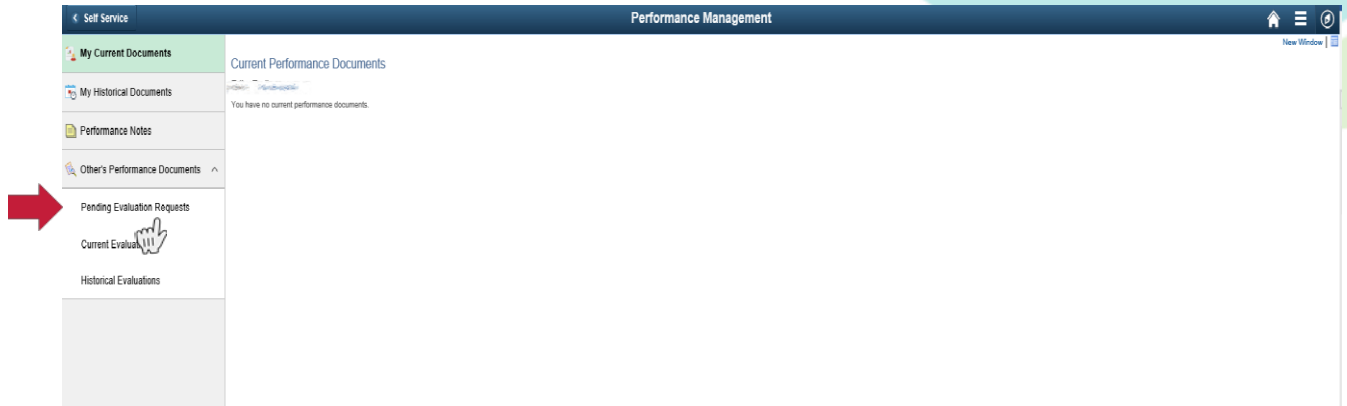
3) Click on the “Performance Management” tile.



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



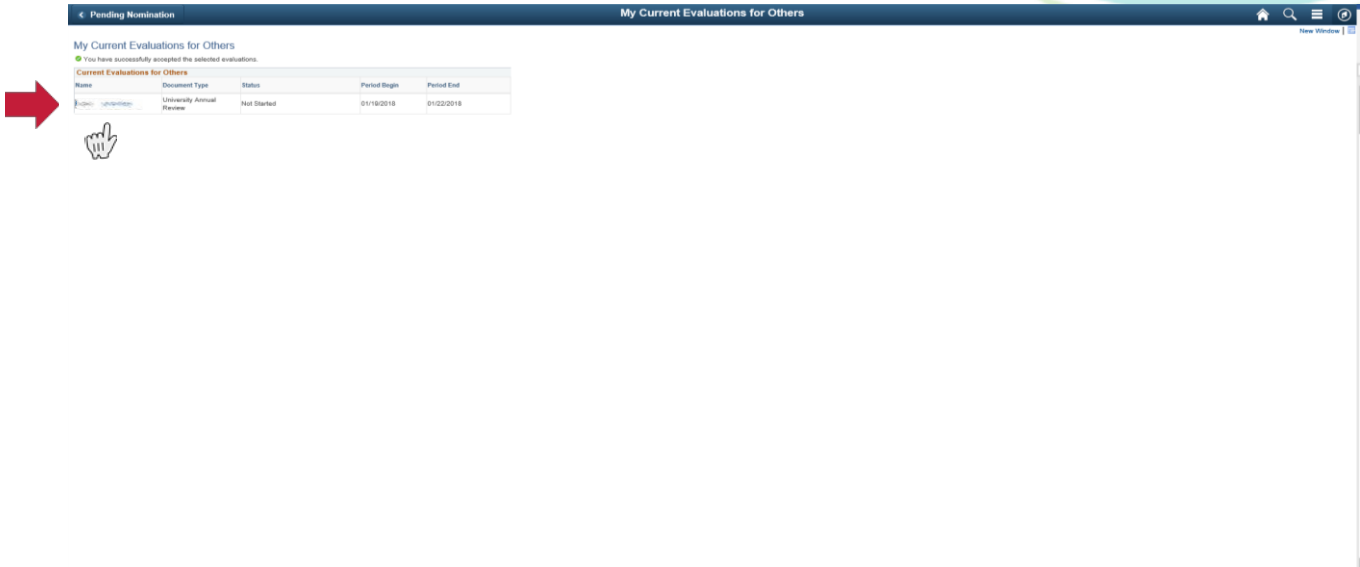
5) Click on Pending Evaluation Requests.



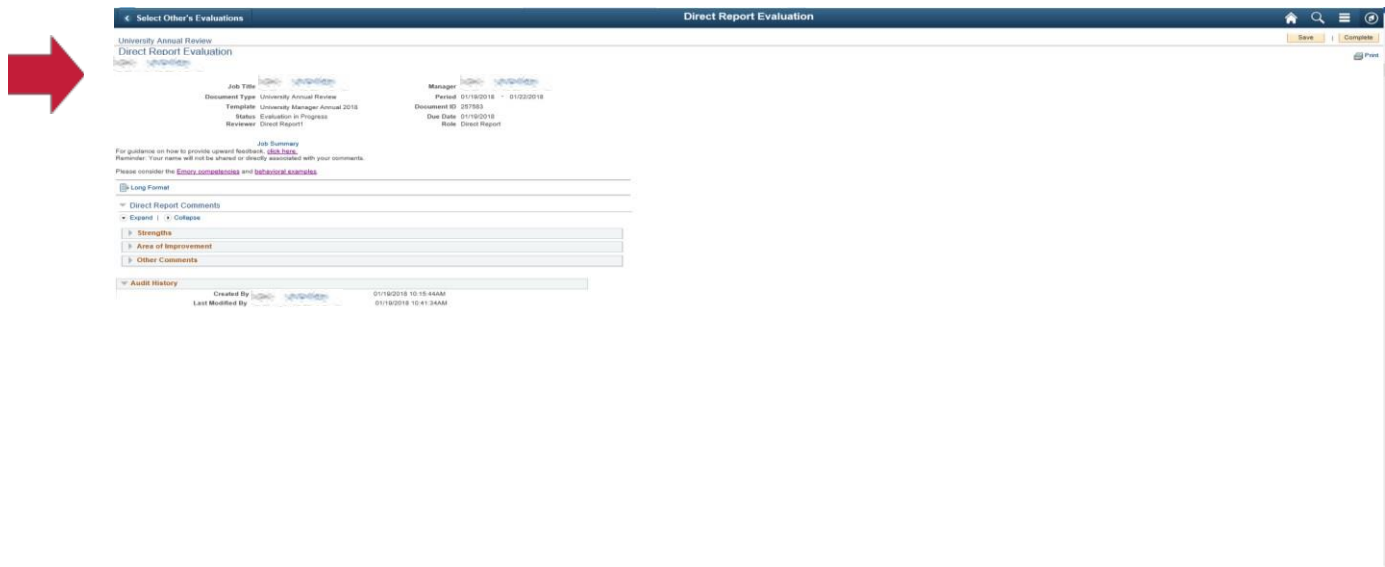
6) Click box next to name of supervisor you want to provide feedback for and click "Accept."



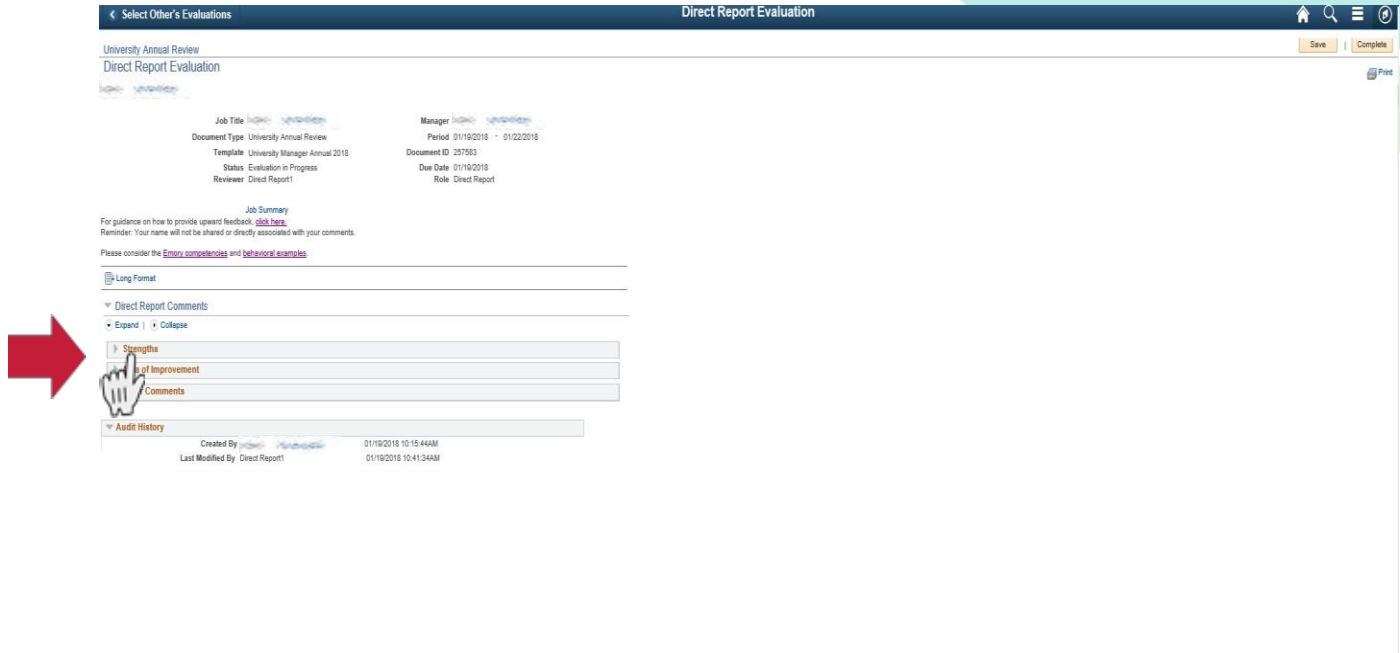
7) You will see the “My Current Evaluations for Others” page. Click on the supervisor that you want to provide upward feedback.



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

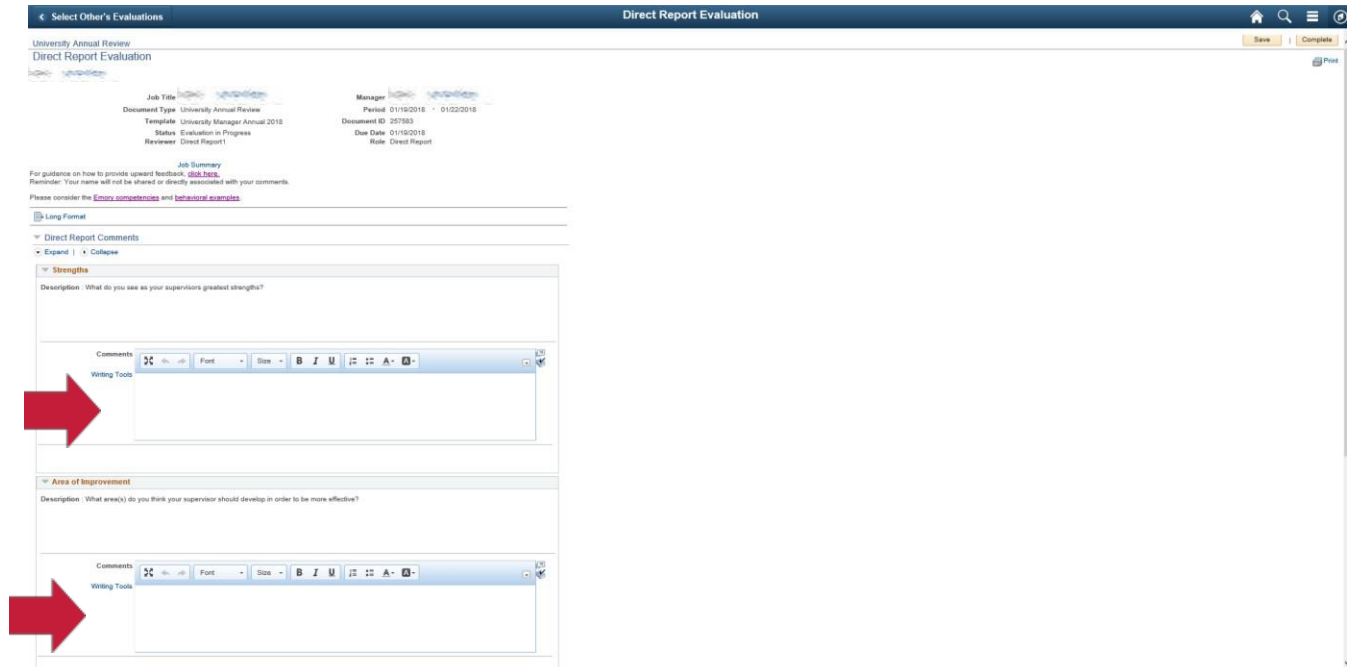


9) Click on the arrow to expand the comment boxes to write feedback.



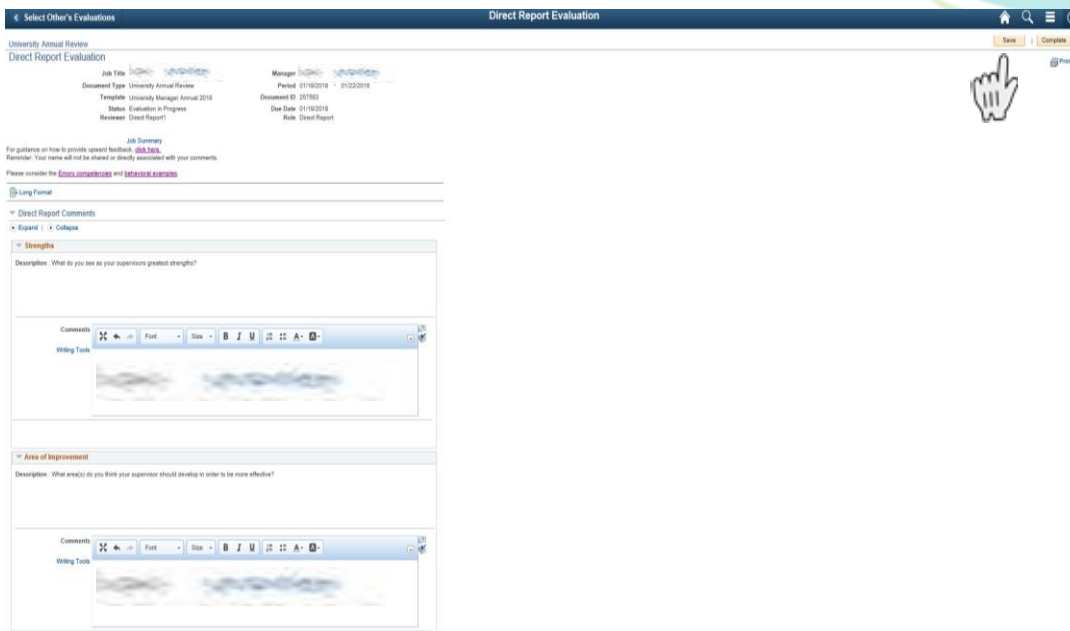
The screenshot shows the 'Direct Report Evaluation' form. The 'Direct Report Comments' section is expanded, showing three comment boxes: 'Strengths', 'Area of Improvement', and 'Comments'. A red arrow points to the 'Strengths' comment box. The form also includes a 'Long Format' section and an 'Audit History' section.

10) Add your supervisor feedback to each comment box.



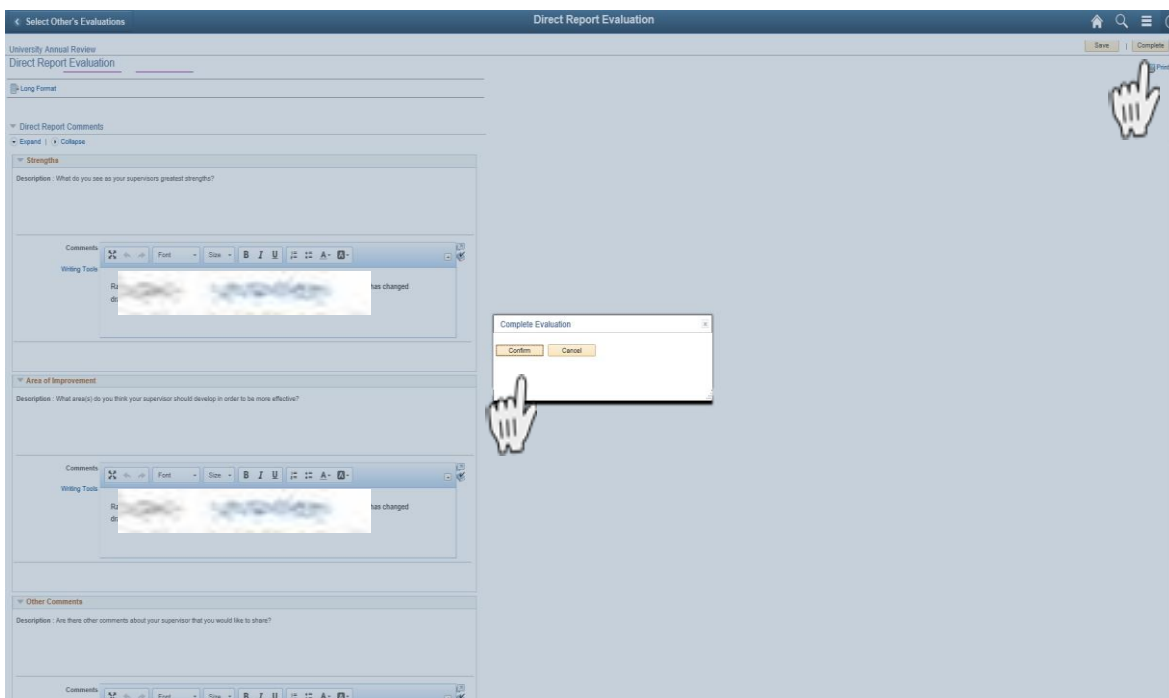
The screenshot shows the 'Direct Report Evaluation' form with the 'Strengths' and 'Area of Improvement' sections expanded. Each section has a 'Description' field and a 'Comments' text area. Red arrows point to the 'Comments' text areas in both sections. The form also includes a 'Long Format' section and an 'Audit History' section.

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



The screenshot shows the 'Direct Report Evaluation' form. At the top right, there are two buttons: 'Save' and 'Complete'. A red arrow points to the 'Save' button. A hand cursor is also visible over the 'Save' button. The form includes sections for 'Strengths' and 'Area of Improvement', each with a text area for comments and a 'Writing Tools' toolbar.

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



The screenshot shows the 'Direct Report Evaluation' form. At the top right, there are two buttons: 'Save' and 'Complete'. A red arrow points to the 'Complete' button. A hand cursor is also visible over the 'Complete' button. A 'Complete Evaluation' dialog box is open, showing 'Confirm' and 'Cancel' buttons. A hand cursor is pointing at the 'Confirm' button. The form includes sections for 'Strengths', 'Area of Improvement', and 'Other Comments', each with a text area for comments and a 'Writing Tools' toolbar.

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

