

Employee Self Assessment

Click the **Review Performance** tile

To-Do

Review Performance



1

Review Due Anytime

Click the **Employee Self-Assessment** link



Employee Self-Assessment
for Amanda EE - Greg

No Due Date

The **Performance Appraisal** form provides:

1. Navigational quick links to each section of the form via the form map.

2. A process flow **Route Map** that tracks where you are in the process and the steps completed.

Back to: To-Do

Performance Appraisal for Amanda EE - Greg

Amanda EE - Greg 11 Incomplete Items

Route Map Introduction Employee Information Review Information Goals Competencies - Statewide Competencies - Role Current Role Development Plan

Route Map Hide

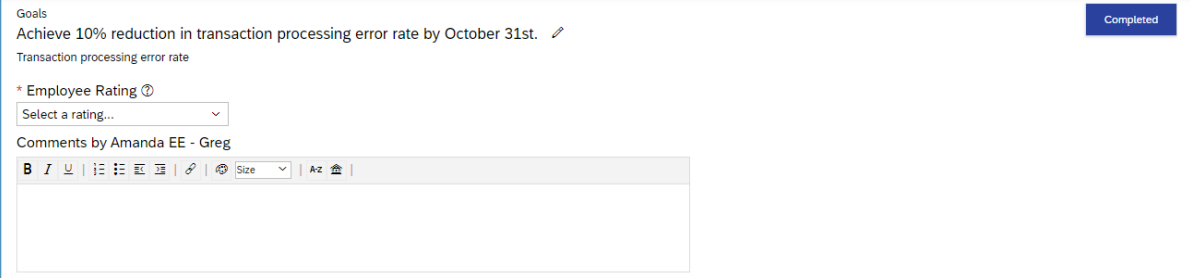
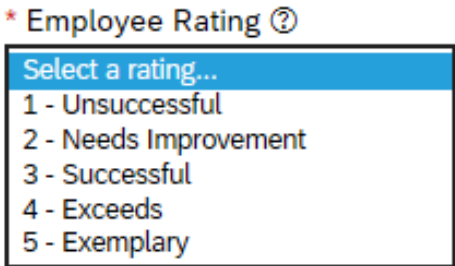
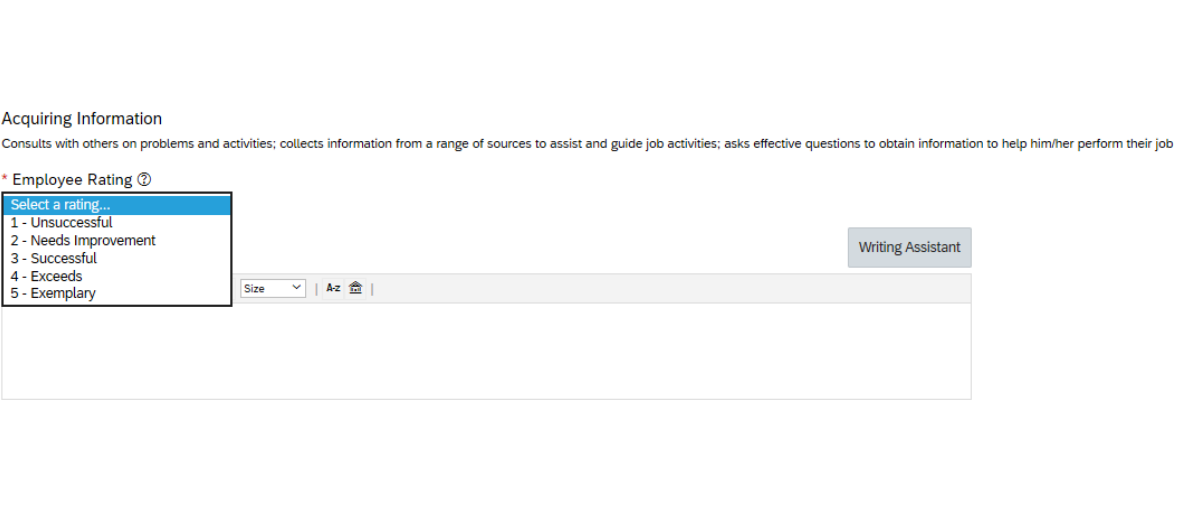
Assessment

1 Self-Assessment 2 Manager Assessment 3 2nd Level Manager Review and Approval 4 HR Review 5 Appointing Authority

Scroll down to the section titled **Goals**. This is the first section in the form.

Goals

Each goal rating must be supported with information describing how the employee has performed in meeting the measurable outcomes. If a goal is no longer relevant to the review period or cancelled, select the rating "Not Applicable".

| | |
|--|---|
| | |
| <p>For each Goal, enter a Rating and relevant Comments.</p> |  |
| <p>Select one of the following Employee Ratings for each Goal.</p> |  |
| <p>Scroll down to the section titled Competencies.</p> <p>There are two sections of competencies, Statewide and Role-based.</p> <p>For each Statewide and Role-based competency sections, enter a Rating and relevant Comments.</p> <p>For suggested wording, click Writing Assistant.</p> |  |

Click on Writing Assistant to utilize this tool.

Writing Assistant

For each competency, sample language is provided that aligns to three performance levels.

Click the performance level; sample language appears in the Preview Quote Below section.

Once you are satisfied with the wording, click **Paste Quote**.

Click **Close**.

Edit sample language as appropriate

Find a quote about Amanda's competency

Serving Customers

Builds strong relationships with customers; stays aware of customer needs, concerns and satisfaction; responds promptly to customer questions and requests; effectively manages customer expectations

Select topics below

Improve

- doesn't follow service procedures or know products well
- inadequate customer follow-through
- inconsistent customer communication

Meets

- available to customers
- follows service procedures
- follows through with customers
- handles service problems
- knows products, services

Exceeds

- always available to customers
- always follows service procedures
- always handles customer inquiries
- communicates well with customers
- highly professional demeanor

Describe Behavior

Give Advice

Select a Narrative:

I Amanda

Preview Quote Below

Scroll down to the section titled **Developmental Goals.**

Enter in relevant comments

Current Role

Effective Communication: On Track

Effective communication can be challenging. Often, ineffective communication results from misunderstanding. Try not to get discouraged if at first others do not understand what you are saying. Make your best efforts to restate and clarify.

Summary information from meetings

Comments by Amanda EE - Greg

B *I* U | Size | A-Z

Goal Details

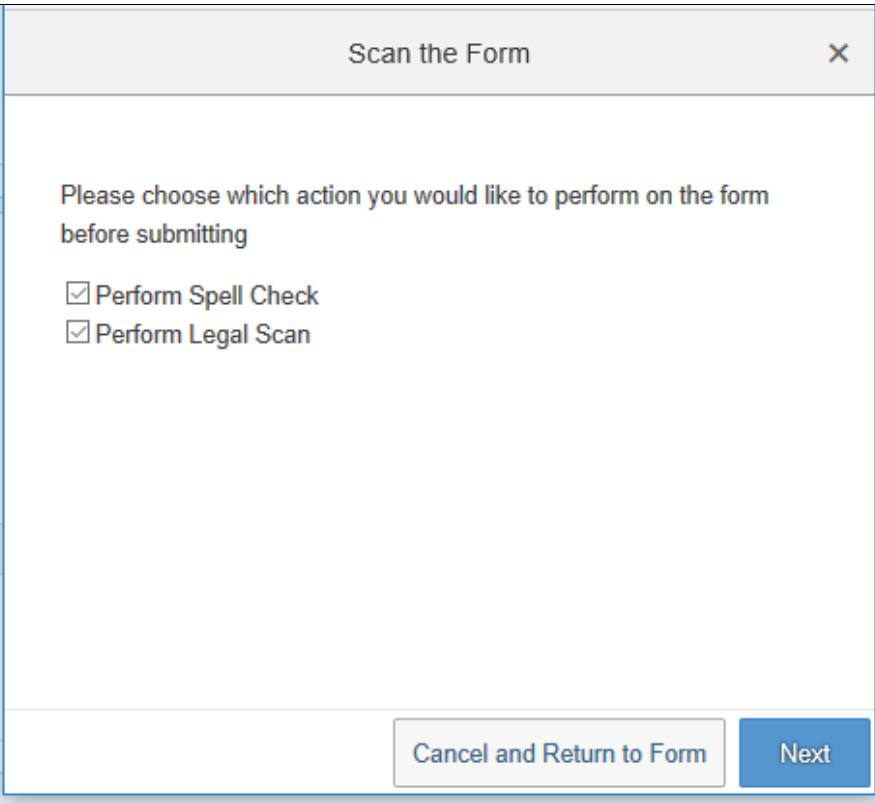
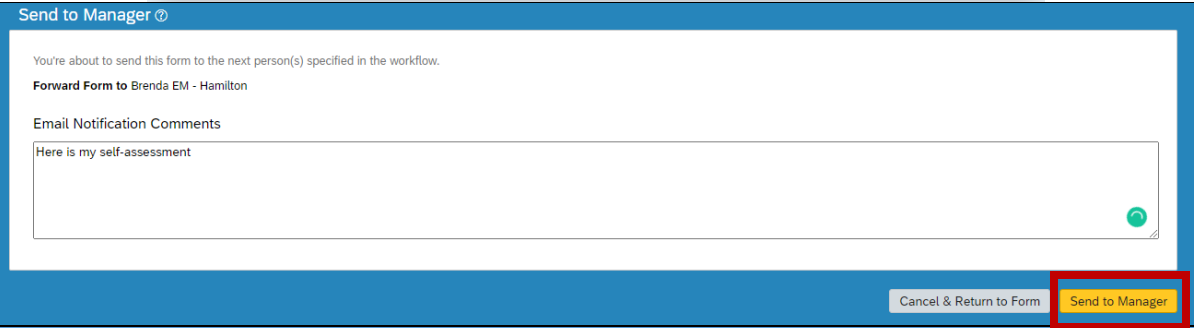
| Start Date | Due Date | Status | Comments |
|------------|------------|----------|----------|
| 01/01/2020 | 06/30/2020 | On Track | |

Once completed with all sections click **Send to Manager** to complete the self-assessment.

Cancel

Save and Close

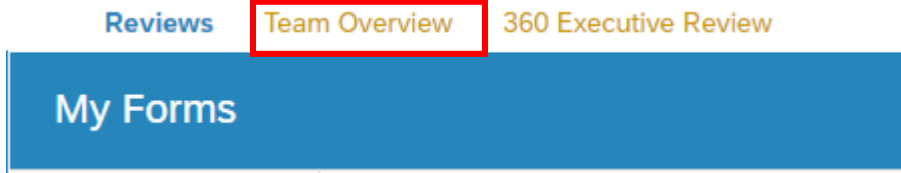
Send to Manager

| | |
|--|---|
| <p>Once submitted the form will have the option to go through a Spell Check and Legal Scan</p> |  <p>The screenshot shows a dialog box titled "Scan the Form" with a close button (X) in the top right corner. The main text reads: "Please choose which action you would like to perform on the form before submitting". Below this, there are two checked checkboxes: "Perform Spell Check" and "Perform Legal Scan". At the bottom of the dialog, there are two buttons: "Cancel and Return to Form" and "Next".</p> |
| <p>Input Email Notification Comments Click Send to Manager</p> |  <p>The screenshot shows a dialog box titled "Send to Manager" with a help icon (i) in the top right corner. The main text reads: "You're about to send this form to the next person(s) specified in the workflow." Below this, it says "Forward Form to Brenda EM - Hamilton". There is a section for "Email Notification Comments" with a text area containing the text "Here is my self-assessment". At the bottom right, there are two buttons: "Cancel & Return to Form" and "Send to Manager", with the "Send to Manager" button highlighted by a red box.</p> |
| <p>Access Performance Appraisal prior to Self-Assessment Completion</p> | |

Click **Performance** from the Home Drop Down menu



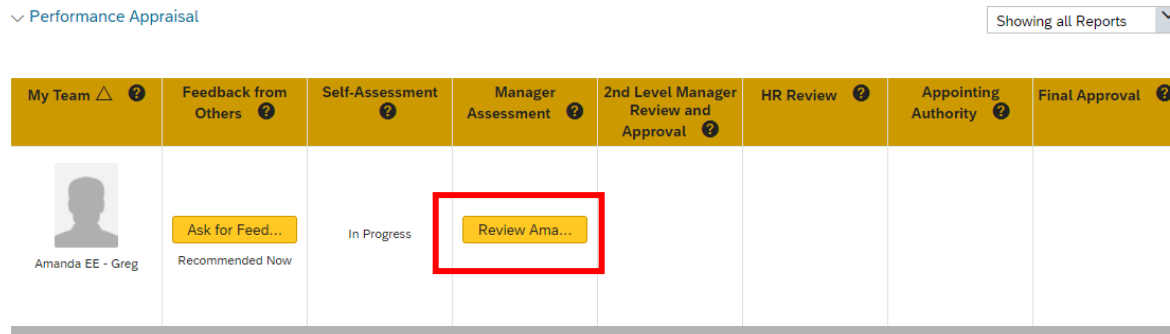
Click the **Team Overview** Tab



Under Performance Appraisal find the employee

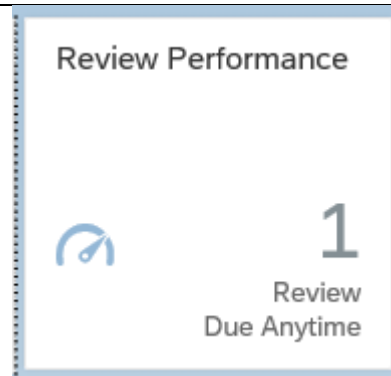
Click **Review "Employee Name"** under the Manager Assessment column to complete evaluation

Tip: the form will not be able to move to the 2nd level manager until the employee has completed the self-assessment

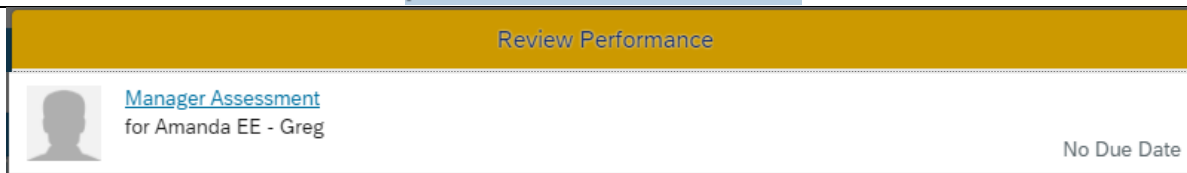


Performance Appraisal (Manager) – After Self-Assessment Completion

Click the **Review Performance** tile

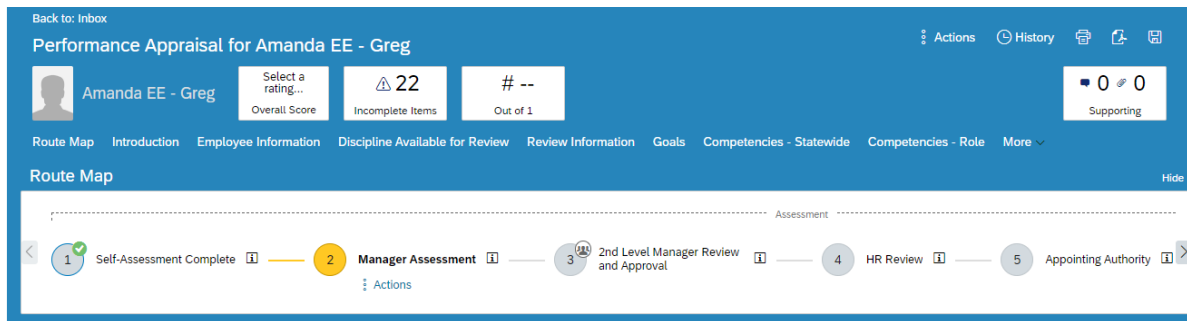


Click Manager Assessment





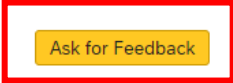



The **Performance Assessment** form provides:

1. Navigational jump links to each section of the form via the form map.
2. A process flow **Route Map** that tracks where you are in the process and the steps completed.



Ask for Feedback

| | |
|--|---|
| <p>To Ask for feedback from others:</p> <p>Click the Team Overview Tab</p> | <p>Reviews Team Overview 360 Executive Review</p> <p>Back to: Inbox</p> <h3>Performance Appraisal for Amanda EE - Greg</h3> <div> Amanda EE - Greg</div> <div>Select a rating... Overall Score</div> <div> 22 Incomplete Items</div> <div># -- Out of 1</div> |
| <p>Find the employee you want to get feedback for</p> <p>Click Ask for Feedback</p> | <div>Feedback from Others  Self-Assessment </div> <div> Recommended Now</div> <div></div> |

Three options for selecting an individual:


Option 1: Add an existing employee – search by name (internal employees)

Option 2: Add external Email address – for anyone outside of the company

Option 3: Recommended List – employees in your hierarchy



Tip: you are able to choose more than one individual at a time.

Ask for Feedback about Amanda EE - Greg


 Send an email to 3-5 people and we will show their feedback with the performance review forms

Add existing employee
 Add external Email address

Or select from the following recommended list

 Elanor AA - Keller
 Fran DR - Lesser

People:
Sent on 08/24/2020



Message:

Hi [[RECIPIENT_NAME]],
I would appreciate your feedback regarding the work you did with Amanda EE - Greg. I am looking for any strengths and opportunities for development you have observed. Please provide your feedback by 01/31/2021 so I will have enough time to incorporate your thoughts into my review.


Thanks,
Brenda EM - Hamilton

Once individuals have been selected

Craft the message

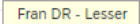
Click Send Email





Ask for Feedback about Amanda EE - Greg

 Send an email to 3-5 people and we will show their feedback with the performance review forms

Add existing employee
 Add external Email address

Or select from the following recommended list

 Fran DR - Lesser








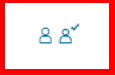

People:
 New Requests
  
 Sent on 08/24/2020


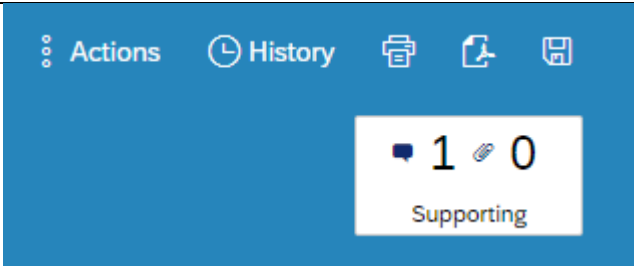
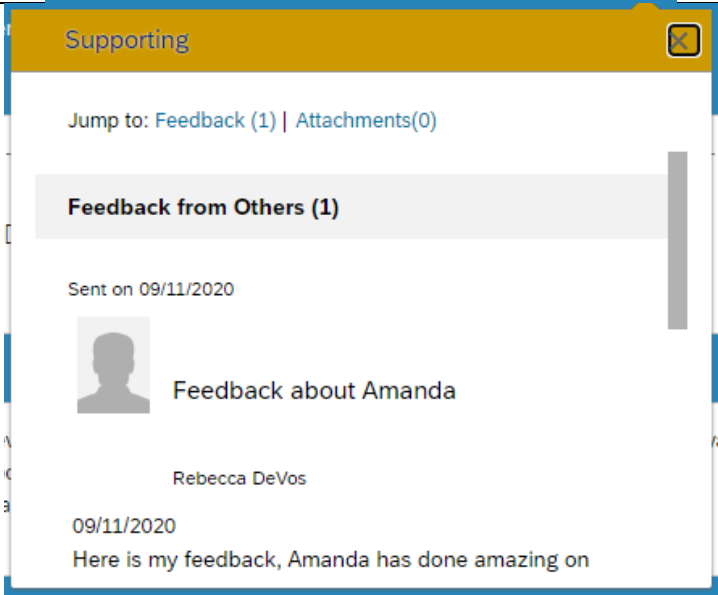
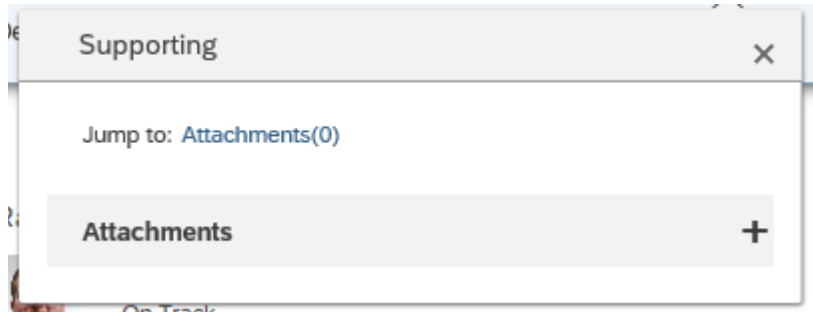
Message:
 Hi [[RECIPIENT_NAME]],
 I would appreciate your feedback regarding the work you did with Amanda EE - Greg. I am looking for any strengths and opportunities development you have observed. Please provide your feedback by 01/31/2021 so I will have enough time to incorporate your thoughts my review.
 Thanks,
 Brenda EM - Hamilton

Once individuals return feedback a small check mark will be placed next to their name.

Tip: you can come back here and add additional people by clicking on the people.

Performance Appraisal

| My Team   | Feedback from Others  | Self-Assessment  | Manager Assessment  | 2nd Level Manager Review and Approval  |
|---|---|---|--|---|
|  Amanda EE - Greg |  |  | <input type="button" value="Review Ama..."/> | |

| | |
|--|--|
| <p>The Supporting Information Pod has two features:</p> <p>Feature 1: Feedback from Others</p> <p>Feature 2: Attachment</p> |  |
| <p>Feature 1: Feedback from Others</p> <p>Once an individual responds to the manager's request for feedback.</p> <p>Click on the Supporting tab</p> <p>The feedback will show up in the dialog box</p> |  |
| <p>Click the + symbol to add an attachment</p> |  |

Browse for the file to attach and then select upload

Add Attachment

Accepted file types are:
 doc, docx, pdf, txt, htm, ppt, pptx, xls, xlsx, gif, png, jpg, jpeg, html, rtf, bmp, msg, docm, tif

Choose File: Browse...

Goals Section


Scroll down to the section titled **Goals**. This is the first section in the form.

For each **Goal**, review the **Employee Comment**, enter a **Rating** and add relevant **Manager Comments**.

Goals











Achieve 10% reduction in transaction processing error rate by October 31st. 

Transaction processing error rate

* Manager Rating 

4 - Exceeds 

* Comments by Brenda EM - Hamilton

B I U |  |  |  |  |  |  |  |  | Size  |  |  |


comment

Goal Details

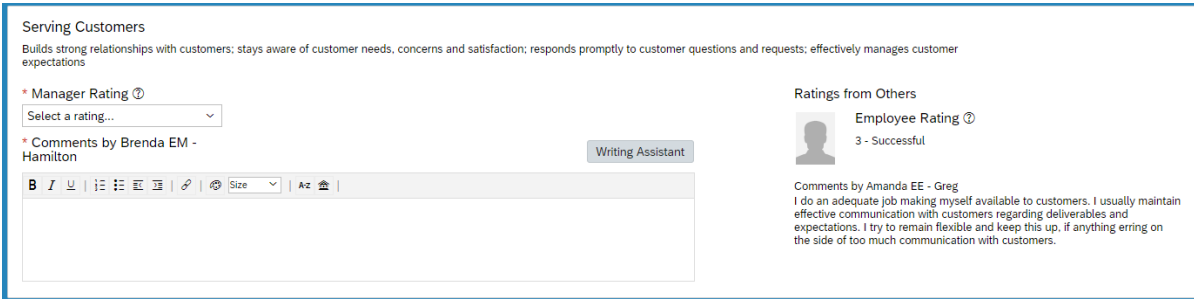
| Start Date | Due Date | Status | Comments |
|------------|------------|-----------|---|
| 07/01/2019 | 12/31/2020 | Completed | 1. Brenda EM - Hamilton 06/10/2020 Amanda, you did a great job of hosting a brainstorming session with your co-workers to talk about what issues they are seeing as it relates to our processing errors. You have identified an area in the system that if not filled out properly will create an error with the files. Your proactive approach with contacting IOT to see if this field can be auto-filled when pulling in employee information was a great solution. I look forward to seeing what additional action steps you are able to find to help reduce the error rate. Just this find in itself will reduce the error rate. More |

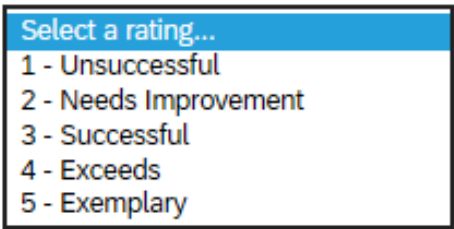
 Ratings from Others
 Employee Rating 
 3 - Successful

Comments by Amanda EE - Greg
 I reduced the process errors by 12%

| | |
|---|--|
| | |
| <p>Select one of the following Ratings for each goal.</p> |  |

Competencies: State-Wide and Role-Based Section

| | |
|---|---|
| <p>Scroll down to the section titled Competencies.</p> <p>There are two sections of competencies, Statewide and Role-based.</p> <p>For each Statewide and Role-based competency sections, enter a Rating and relevant Comments.</p> <p>For suggested wording, click Writing Assistant.</p> |  |
|---|---|

| | |
|---|--|
| <p>Select one of the following Ratings for each competencies.</p> |  |
|---|--|

Click on Writing Assistant to utilize this tool.

For each unit competency sample language is provided that aligns to three performance levels.

Click the performance level; sample language appears in the Preview Quote Below section.

Once you are satisfied with the wording, click **Paste Quote**.

If not wanting to Give Advice click **Close**.

Edit sample language as appropriate in the comment box after clicking Place Quote

Writing Assistant

Find a quote about Amanda's competency

Serving Customers
Builds strong relationships with customers; stays aware of customer needs, concerns and satisfaction; responds promptly to customer questions and requests; effectively manages customer expectations

Select topics below

| Improve | Meets | Exceeds |
|--|--|---|
| <ul style="list-style-type: none">doesn't follow service procedures or know products wellinadequate customer follow-throughinconsistent customer communication | <ul style="list-style-type: none">available to customersfollows service proceduresfollows through with customershandles service problemsknows products, services | <ul style="list-style-type: none">always available to customersalways follows service proceduresalways handles customer inquiriescommunicates well with customershighly professional demeanor |

Describe Behavior Give Advice

Select a Narrative:
 Amanda You

Preview Quote Below
Amanda does an adequate job making herself available to customers. Amanda usually maintains effective communication with customers regarding deliverables and expectations. Amanda tries to remain flexible and

Close Place Quote

To add advice click on Give Advice and select the option that best fits.

Click **Place Quote**.

Click **Close** once done.

Serving Customers

Has sufficient knowledge of products and services and helps internal and external customers enthusiastically; communicates well with customers and follows up as necessary; is always professional and represents the organization positively

Select topics below

- inadequate customer follow-through
- inconsistent customer communication
- not responsible for service problems
- unavailable to customers
- unprofessional appearance
- follows through with customers
- handles service problems
- knows products, services
- professional demeanor
- always handles customer inquiries
- communicates well with customers
- highly professional demeanor
- takes responsibility for service problems

Describe Behavior **Give Advice**

Know the policies and procedures of the company in addition to the products and services. Take some time to read through the written policies so that you are aware of what is expected of you. Talk with your coworkers about past experiences with customer service as a way to help prepare for future customer interactions.

Place Quote

Close Place Quote

Edit comments as needed.

Serving Customers









Builds strong relationships with customers; stays aware of customer needs, concerns and satisfaction; responds promptly to customer questions

* Manager Rating

3 - Successful

* Comments by Brenda EM - Hamilton

Writing Assistant

B *I* U |      |   Size | A-Z 


Amanda does an adequate job making herself available to customers. Amanda usually maintains effective communication with customers regarding deliverables and expectations. Amanda tries to remain flexible and keep this up, if anything erring on the side of too much communication with customers.

Developmental Goals

If Developmental Goals have already been identified fill in relevant comments.









Current Role
Effective Communication: On Track

Effective communication can be challenging. Often, ineffective communication results from misunderstanding. Try not to get discouraged if at first others do not understand what you are saying. Make your best efforts to restate and clarify.

 Summary information from meetings

Comments by Brenda EM - Hamilton

Ratings from Others
There are no Ratings from Others.

B *I* U |      |   Size | A-Z 

Goal Details

| | | | |
|---------------------|------------------------------|-----------------|----------|
| Start Date | 01/01/2020 | Status | On Track |
| Due Date | 06/30/2020 | Comments | |
| Competencies | 1. Communicating Effectively | | |


Overall Performance Rating

| <p>The overall performance rating is a reflection of the overall summary of performance achievements and behaviors described in the appraisal.</p> | <div data-bbox="546 188 1730 500"> <h3>Overall Performance Rating</h3> <p>Select a rating that reflects the overall summary of performance achievements and behaviors described.</p> <p>* Overall Performance Appraisal Rating ?</p> <p>Select a rating... ▼</p> </div> | | | | | | | | | | | | | | | | |
|--|---|------|--------|-------|-----|--|----------------|--|----------------|--------------------------|-----|-------------------|----------------|---------------------------------|----------------|---------------------|--------------------|
| <p>Select the Overall Performance Appraisal Rating</p> | <div data-bbox="546 500 1730 792"> <p>Overall Performance Appraisal Rating ?</p> <p>Select a rating... ▼</p> <ul style="list-style-type: none"> Select a rating... 1 - Unsuccessful 2 - Needs Improvement 3 - Successful 4 - Exceeds 5 - Exemplary </div> | | | | | | | | | | | | | | | | |
| <p>There will be a summary of each section to help with the overall performance appraisal rating.</p> | <table border="1" data-bbox="546 792 1730 1076"> <thead> <tr> <th>Name</th> <th>Rating</th> </tr> </thead> <tbody> <tr> <td>Goals</td> <td>3.0</td> </tr> <tr> <td>Achieve a customer satisfaction rating of at least 4.2 for services provided during 2019</td> <td>3 - Consistent</td> </tr> <tr> <td>Achieve 85 % customer retention rate by 12/31/2019</td> <td>3 - Consistent</td> </tr> <tr> <td>Competencies - Statewide</td> <td>3.0</td> </tr> <tr> <td>Serving Customers</td> <td>3 - Consistent</td> </tr> <tr> <td>Meeting Basic Work Expectations</td> <td>3 - Consistent</td> </tr> <tr> <td>Competencies - Role</td> <td>Select a rating...</td> </tr> </tbody> </table> | Name | Rating | Goals | 3.0 | Achieve a customer satisfaction rating of at least 4.2 for services provided during 2019 | 3 - Consistent | Achieve 85 % customer retention rate by 12/31/2019 | 3 - Consistent | Competencies - Statewide | 3.0 | Serving Customers | 3 - Consistent | Meeting Basic Work Expectations | 3 - Consistent | Competencies - Role | Select a rating... |
| Name | Rating | | | | | | | | | | | | | | | | |
| Goals | 3.0 | | | | | | | | | | | | | | | | |
| Achieve a customer satisfaction rating of at least 4.2 for services provided during 2019 | 3 - Consistent | | | | | | | | | | | | | | | | |
| Achieve 85 % customer retention rate by 12/31/2019 | 3 - Consistent | | | | | | | | | | | | | | | | |
| Competencies - Statewide | 3.0 | | | | | | | | | | | | | | | | |
| Serving Customers | 3 - Consistent | | | | | | | | | | | | | | | | |
| Meeting Basic Work Expectations | 3 - Consistent | | | | | | | | | | | | | | | | |
| Competencies - Role | Select a rating... | | | | | | | | | | | | | | | | |
| <p>Add in Overall Performance Comments.</p> | <div data-bbox="546 1076 1730 1352"> <p>Section Comments:</p> <p>* Overall Performance Comments</p> <p>B <i>I</i> <u>U</u> Size ▼ A-z </p> <div style="border: 1px solid #ccc; height: 80px; margin-top: 5px;"></div> </div> | | | | | | | | | | | | | | | | |

To View the Overall Score, scroll to the top of the form.

Tip: the Overall Score will populate once the form is either manually saved or autosaved.

Performance Appraisal for Amanda EE - Greg

 Amanda EE - Greg

| | | |
|---------------------------------|-------------------------|-----------------|
| 3 - Successful Overall Score | ✓ 0 Incomplete Items | # 1 Out of 1 |
|---------------------------------|-------------------------|-----------------|

Select **Send to Second Level Manager** to move the review forward.

Cancel Save and Close Send Back **Send to 2nd Level Manager**

To run Spell Check and Legal Scan ensure the checkboxes are checked

Click **Next**

Scan the Form

Please choose which action you would like to perform on the form before submitting

- Perform Spell Check
- Perform Legal Scan

Cancel and Return to Form **Next**

| | |
|--|--|
| <p>Add any comments to show in an email notification to the 2nd level manager.</p> <p>Click Send to 2nd Level Manager</p> | |
|--|--|

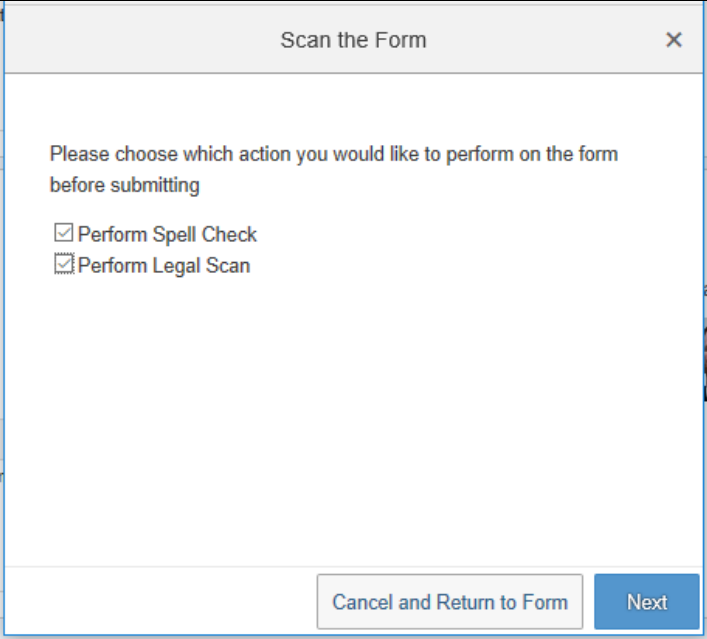
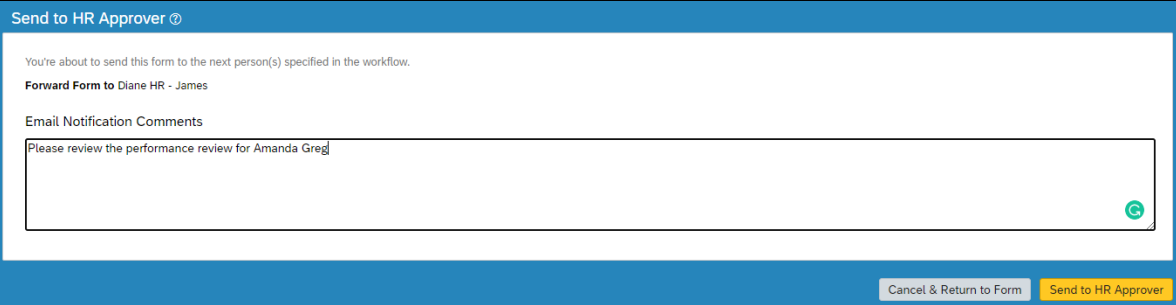
2nd Level Manager Comment Review and Update


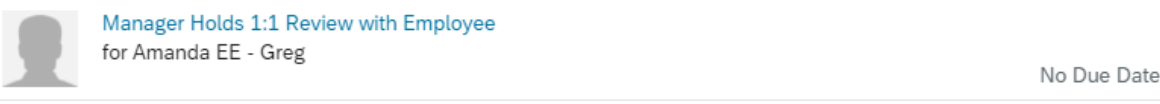
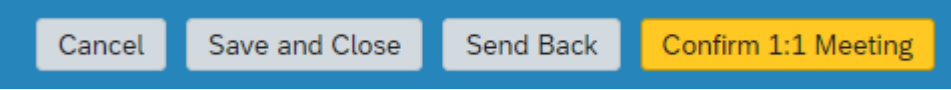
| | |
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| <p>After sending the appraisal to the 2nd level manager, the 2nd level manager will have the opportunity to send back comments.</p> <p>The comments will appear after each section: Goals, Statewide Competencies, Role-based Competencies, and Overall Performance.</p> | |
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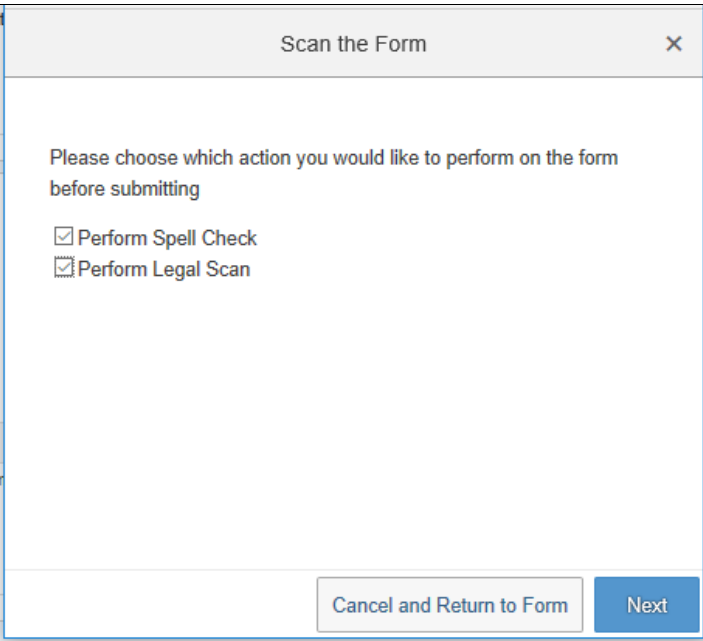
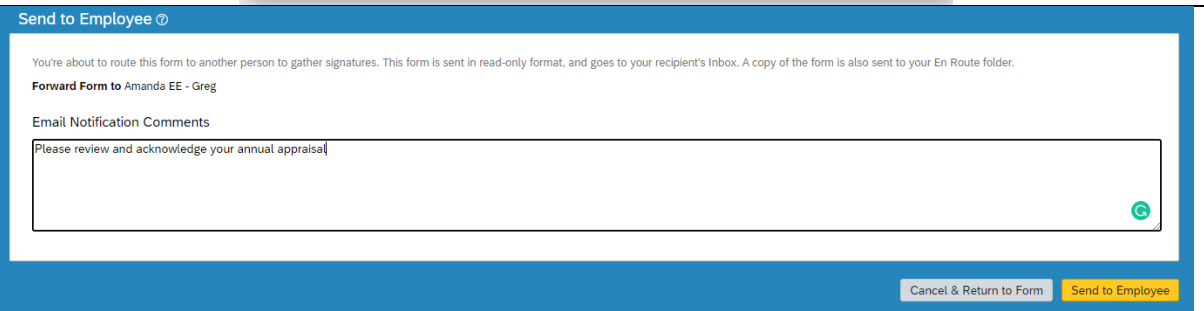

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| <p>Once reviewed and updated:</p> <p>Click Send Back for Manager Review/Revision</p> | |
|---|--|

2nd Level Manager Functions (2nd Level Manager Only)

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| <p>As a 2nd Level Manager, there are two options after reviewing a performance appraisal:</p> <p>Option 1: Send Back for Manager Review/Revision</p> | |
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| <p>Option 2: Send to HR Approver</p> | |
| <p>Run Spell Check and Legal Scan by ensuring the checkboxes are checked</p> <p>Click Next</p> |  <p>The screenshot shows a dialog box titled "Scan the Form" with a close button (X) in the top right corner. The main text reads: "Please choose which action you would like to perform on the form before submitting". Below this text are two checked checkboxes: "Perform Spell Check" and "Perform Legal Scan". At the bottom of the dialog box, there are two buttons: "Cancel and Return to Form" and "Next".</p> |
| <p>Add any comments to show in an email notification to the HR Reviewer.</p> <p>Click Send to HR Approver</p> |  <p>The screenshot shows a screen titled "Send to HR Approver" with a help icon. The text reads: "You're about to send this form to the next person(s) specified in the workflow." Below this, it says "Forward Form to Diane HR - James". There is a section for "Email Notification Comments" with a text input field containing the text "Please review the performance review for Amanda Greg". At the bottom right of the input field is a green speech bubble icon. At the bottom of the screen, there are two buttons: "Cancel & Return to Form" and "Send to HR Approver".</p> |
| <p>Manager 1:1 Post Discussion</p> | |

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| <p>Once the annual appraisal has been approved it is then released for a 1:1 discussion with the employee</p> <p>Click Review Performance tile</p> |  |
| <p>Click the Manager Holds 1:1 Review with Employee link</p> |  |
| <p>Once the 1:1 discussion is complete</p> <p>Click Confirm 1:1 meeting for the appraisal to be sent to the employee for acknowledgement</p> |  |

| | |
|--|--|
| <p>To run Spell Check and Legal Scan ensure the checkboxes are checked</p> <p>Click Next</p> |  <p>The screenshot shows a dialog box titled "Scan the Form" with a close button (X) in the top right corner. The main text reads: "Please choose which action you would like to perform on the form before submitting". Below this text are two checked checkboxes: "Perform Spell Check" and "Perform Legal Scan". At the bottom of the dialog, there are two buttons: "Cancel and Return to Form" and "Next".</p> |
| <p>Add any comments to show in an email notification to the Employee.</p> <p>Click Send to Employee</p> |  <p>The screenshot shows a "Send to Employee" dialog box with a blue header. Below the header, there is a text area for "Email Notification Comments" containing the text "Please review and acknowledge your annual appraisal". At the bottom right of the dialog, there are two buttons: "Cancel & Return to Form" and "Send to Employee".</p> |
| <h2 style="background-color: #4a86e8; color: white; padding: 5px;">Employee Acknowledgement</h2> | |
| <p>Employee clicks the Employee Signs Performance Appraisal link</p> |  <p>The screenshot shows a notification card with a grey silhouette icon on the left. To the right of the icon, the text reads: "Employee Signs Performance Appraisal for Amanda EE - Greg". In the top right corner of the card, it says "No Due Date". At the bottom right, there is a "Close" button.</p> |

Employee enters in any relevant comments and will click **Sent to Manager** to acknowledge and sign the performance appraisal

Performance Appraisal Acknowledgement

Manager: Acknowledgement by the manager indicates the information contained within this appraisal is accurate based upon the manager's best judgement of service performed by the employee for the review period.
Employee: Acknowledgement by the employee only indicates the information contained within this appraisal has been made available for review. Acknowledgement does not indicate agreement with any of the ratings.

Employee: *Amanda EE - Greg has not signed yet*

Acknowledgement Comments

B I U | | | | | | | Size | AZ

Manager: *Brenda EM - Hamilton has not signed yet*

Cancel Save and Close **Send to Manager**

Add any comments to show in an email notification to the Manager.
Click **Send to Manager**

Send to Manager

You're about to route this form to another person to gather signatures. This form is sent in read-only format, and goes to your recipient's Inbox. A copy of the form is also sent to your En Route folder.

Forward Form to Brenda EM - Hamilton

Email Notification Comments

I have acknowledged my appraisal.

Cancel & Return to Form Sign and Open Next Form **Send to Manager**

Manager Acknowledgment

Click on the **Manager Signs Performance Appraisal** link

 **Manager Signs Performance Appraisal**
for Amanda EE - Greg

No Due Date

Manager enters any relevant comments and then click **Set to Complete** to acknowledge and sign the performance appraisal.

Performance Appraisal Acknowledgement

Manager: Acknowledgement by the manager indicates the information contained within this appraisal is accurate based upon the manager's best judgement of service performed by the employee for the review period.
Employee: Acknowledgement by the employee only indicates the information contained within this appraisal has been made available for review. Acknowledgement does not indicate agreement with any of the ratings.

Employee: **Amanda EE - Greg** 09/14/2020

Manager: *Brenda EM - Hamilton has not signed yet*

Acknowledgement Comments

B I U | | | | | | | | | | Size | A2 |

Cancel Save and Close **Set to Complete**

Click **Set to Complete** to finalize this step

Set to Complete

You're about to submit this form for completion. A copy of the form will be sent to your Completed folder.

Cancel & Return to Form **Set to Complete**

Completed Appraisal Forms

Click **Performance** from the Home Drop Down menu



Click **Completed** under My Forms

My Forms

All Forms
In Progress
Inbox
En Route
Completed

Items per page 10 | Page 1 of 1 | Showing 1-8 of 8 | All My Direct Reports

[Create New Form](#) | Mass Route Options | [GO](#)

> Search

Click on the completed form

| Form Title | Employee | Form Start Date | Form End Date | Form Due Date | Completed On | Action |
|---|------------------|-----------------|---------------|---------------|--------------|-------------------|
| <input checked="" type="checkbox"/> Performance Appraisal_2021 for Amanda EE - Greg | Amanda EE - Greg | 01/01/2020 | 12/31/2020 | 01/14/2021 | 09/02/2020 | i |