

Quick Start Guide – Performance Manager

Appraisals

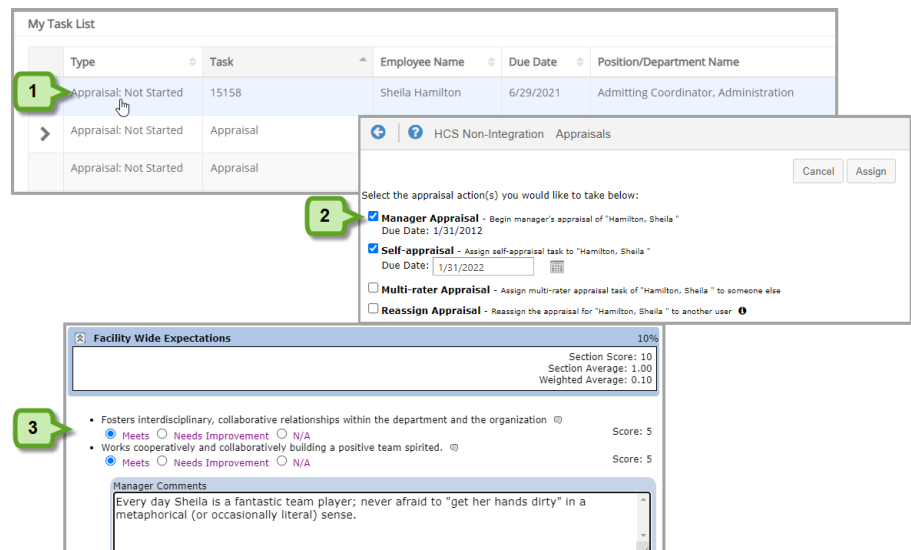
Appraisals in Performance Manager® provide the ability for managers (and employees) to rate performances based on associated job description forms. These appraisals are conducted on varying intervals depending on company policy.

This Quick Start Guide aims to provide the basic information necessary to quickly complete an appraisal, along with the various options that are available during the process. Please note that due to the configurability of individual customer workflows in Performance Manager, some options discussed in this document may not be available in your system.

Process Overview

The basic process for completing an appraisal is listed below. These steps assume that the necessary pre-requisites have been completed, such as the setup and assigning of job description forms, scheduling of an appraisal, and completion of goal forms. These steps are intended for Manager-level employees.

1. From the *Tasks* page, locate and select the desired **Appraisal** task. Each individual employee requiring an appraisal has their own Appraisal task to complete.
2. Select the appraisal(s) you wish to complete or assign. These options are independent; you may complete the manager appraisal before self or multi-rater appraisals are complete.



The screenshot illustrates the appraisal workflow in three steps:

- Step 1:** A table titled "My Task List" with columns: Type, Task, Employee Name, Due Date, and Position/Department Name. The first row is highlighted, showing "Appraisal: Not Started" for "Sheila Hamilton" with a due date of "6/29/2021" and position "Admitting Coordinator, Administration".
- Step 2:** A modal window titled "HCS Non-Integration Appraisals" is open. It asks to "Select the appraisal action(s) you would like to take below:" and lists four options:
 - Manager Appraisal** - Begin manager's appraisal of "Hamilton, Sheila" (Due Date: 1/31/2012)
 - Self-appraisal** - Assign self-appraisal task to "Hamilton, Sheila" (Due Date: 1/31/2022)
 - Multi-rater Appraisal** - Assign multi-rater appraisal task of "Hamilton, Sheila" to someone else
 - Reassign Appraisal** - Reassign the appraisal for "Hamilton, Sheila" to another user.
- Step 3:** A form titled "Facility Wide Expectations" with a score of 100%. It includes a "Manager Comments" section with the text: "Every day Sheila is a fantastic team player; never afraid to 'get her hands dirty' in a metaphorical (or occasionally literal) sense."

- **Complete Manager Appraisal.** This is the basic employee appraisal form, based on a job description.
- **Self-appraisal.** Self-appraisals are completed by employees in reference to their own performance. This option creates a task for the employee to complete an appraisal on themselves.
- **Multi-rater appraisal.** As part of 360-degree feedback in Performance Manager, multi-rater appraisals are completed by selected employees. Checking this option requires the selection of one or more users and entering a due date for the appraisal.
- **Reassign appraisal.** This allows you to send the employee appraisal task to another manager. Selecting this option makes the **Complete Manager Appraisal** option unavailable. As with the multi-rater option, you must select a user to assign the appraisal to when checking this option.

3. Select **Continue** when done (or **Assign**, depending on which options were selected). If **Complete Manager Appraisal** is checked, the *Manager Appraisal* form displays.

Note: If **Complete Manager Appraisal** is not checked, then selecting **Assign** here displays your Task List.

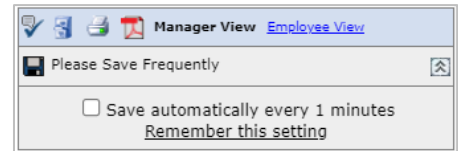
4. Complete the *Manager Appraisal* form, selecting available ratings (or scores) for each item, and adding comments as needed by selecting the **notes** icon (🗨️) and entering text into the box. Since these forms are highly customizable, the available rating options will vary. The remainder of this document covers other available actions for the appraisal form. Note that you are not able to **Save and Send** the form until all required fields are complete – and the system will highlight those areas that require action if you miss anything after submitting.

Additional Options

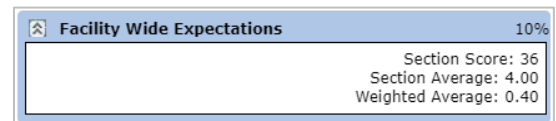
Here are some additional options to keep an eye out for when completing an appraisal in Performance Manager. Keep in mind that your system’s configuration may not include all listed options.

- A. Toolbox.** This handy item stays with you on the right of the page as you scroll through appraisal forms. It contains several handy quick links:

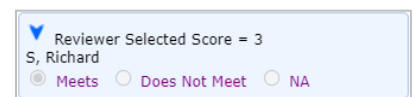
- **Spell check.** Checks your spelling.
- **Language check.** Reviews comments for any potential offensive language (as determined by your system administrator).
- **Filing cabinet.** Opens a view of the employee’s My Folder tab so you can reference pertinent information (such as Job Description, Training, Goals, etc.).
- **Print / Save as PDF.** These two options allow you to print the appraisal form or save it as a PDF.
- **Manager/Employee view.** These links toggle the view of the appraisal form from the standard (Manager View) to what the employee is able to see (Employee View). Helpful in cases where employees are not able to see multi-rater feedback.
- **Please save frequently.** Clicking the icon here saves the appraisal form in its current state. You can also expand the toolbox to reveal an auto-save option – highly recommended for lengthy forms so you don’t lose work due to extended periods of inactivity.



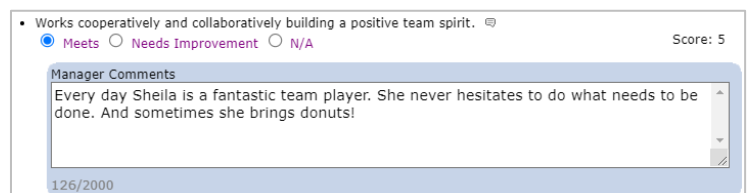
- B. Automatic section rating calculations.** Each section of the appraisal form is scored based on the ratings provided for the items contained within. It provides the overall score and an average per item score.



- C. Self-appraisal/Multi-rater feedback.** If any self and/or multi-rater appraisals have been completed, they will appear in the Manager View. Depending on settings, they may also appear in the Employee View as well.



- D. Manager Comments.** Managers may leave comments for each item in the form by clicking the **notes** icon next to the listing. If manager comments are required, the section automatically appears once a rating is selected.



E. Merit rating increase. When enabled, the system automatically recommends a merit increase based on the scored provided throughout the appraisal form. The recommended increase is highlighted, and managers may have the ability to override the recommendation.

Merit Rating

Merit Increase

0-10 = 0% increase 10-20 = 2% increase 20-30 = 3% increase

Total Score: 35
Total Possible Score: 55
Total Weighted Average: 3.10

F. Date reviewed with Employee. This field allows the manager to indicate when the appraisal form was reviewed with the employee.

Date Reviewed with employee

6/21/2021

Save Save and Send Cancel