


What Can I Do?

- ◆ This screen will allow Managers and HR Professionals to track employees' evaluations and ratings.
- ◆ Employees will not be able to view this screen.
- ◆ Rating Scale Intervals are between 1.0 to 5.0
NOTE: An error message will be displayed for any ratings below 1.0 or above 5.0.
- ◆ To enter a rating of NA, use the number 0.

How Do I Access The Performance Management Screen?

1. Click on **My Direct Reports** under **Quick Links**. The Management Menu will display.
2. Click on the  to the left of the employee name for which the Performance Appraisal is being entered.
3. Select **Performance Appraisal** option from the **Performance Management** drop down menu and click **Go**. The Performance Appraisal screen will display.




How Do I Enter Evaluations?

1. Click on the **New** button in the **Performance Appraisal Overview** section. The Performance Appraisal Detail section will display with fields open for editing.
2. Complete all fields in the **Performance Appraisal Detail** section.
3. Click on the **Save** button. The information will be saved.
NOTE: Managers will receive a warning message that the record will become read only upon saving. They will need to click on the Save button again to complete the action.
4. Return to Step 1 to enter another Evaluation.
5. Click on the **Menu** button to exit the screen and return to the **Management Menu** screen.


How Do I Enter Due Dates?

1. Click on the **New** button in the **Performance Appraisal Overview** section. The Performance Appraisal Detail section will display with fields open for editing.
2. Complete the Evaluation Type and Due Date fields in the **Performance Appraisal Detail** section.
3. Click on the **Save** button. The information will be saved.
4. Return to Step 1 to enter a due date for any additional evaluation types.
5. Click on the **Menu** button to exit the screen and return to the **Management Menu** screen.





How Do I Edit An Employee's Record On The Manager's Behalf?

1. Click on **My Direct Reports** under **Quick Links**. The Management Menu will display.
2. Use the **Search by Employee** functionality (name or ID number) to locate manager. The manager's record will display in the Results section.
3. Click on the  located to the left of the manager's name. The direct reports for that manager will display in the Results section.
4. Click on the  to the left of the employee name for which the Performance Appraisal is being entered.
5. Select **Performance Appraisal** option from the **Performance Management** drop down menu and click **Go**. The Performance Appraisal screen will display.
6. Click the  for the appraisal being viewed in the **Overview** section. Appraisal information will display in the Details section of the screen.
7. Click on the **Edit** button. The fields will open for editing.
8. Change the appropriate fields.
9. Click on the **Save** button. The information will be saved.
10. Click on the **Menu** button to exit the screen and return to the **Management Menu** screen.

How Do I View An Employee's Appraisal History?

1. Click the  for the appraisal being viewed in the **Overview** section. Appraisal information will display in the Details section of the screen.
2. Repeat Step 1 to view details on another appraisal.
3. Click on the **Menu** button to exit the screen and return to the **Management Menu** screen.

Did You Know?

-  No history will be available relating to edits made to records on this screen. Only the most recent information will display on a record.
-  Only A and H roles will be able to edit records once they have been saved. Managers will only have access to view saved records.
-  Either the Evaluation Date or the Due Date must be entered for the record to be saved.
-  Evaluations can be entered for the years of 2006 to 2010.