Step-by-Step Guide to the Online Performance Management Tool for Employees
When it is time for you to do a self-evaluation, your manager will begin the process and you will receive an automatic email.

1. To begin your self-evaluation, click on the link provided in the email.
2. Under the Self Service tab, click on the item that provides More options.

4. Click **Current Documents**

5. Click **Performance Document**
6. Click **Start** to begin the Self-Evaluation.
7. You can expand the competency sections either by clicking on **Expand All** or by clicking on the **expansion arrow** next to each listed competency.
Before starting with providing comments, here are a few things to note about the different features of the competency page. This example displays how the listed competencies appear when they are expanded.

Each competency has its own description provided.

To view the behavioral examples of each competency, click on the link provided.

A spell check feature is also provided. Click this icon to check your spelling.
8. You are now ready to add your self-evaluation comments. You can either type in comments or copy/paste or cut/paste from another document. There are no character limitations.
9. Click **Save** at any time if you need to come back later to complete your comments.

10. If necessary, attachments can be added by clicking on **Add Attachment**. Once you click, you will be prompted with the browse option.

11. Once you have finished adding your comments, click **Complete** to make the document available to your manager.
Performance Document

Complete Evaluation

You have almost finalized your evaluation. If you have no further changes, select the Complete button at the bottom of this page.

Once you select Complete your evaluation will be finalized and sent to your manager for review.

To return to your evaluation before completing, select Cancel.

Complete  Cancel

12. This page provides you one last chance to confirm that you are finished adding comments. If so, click **Complete**. Your Self-evaluation will then be forwarded to your manager for review. Selecting **Cancel** will take you back to your self-evaluation.
13. The self-evaluation is finalized and marked as **Complete**. Click **OK**. It will then appear in your **Historical Documents**.
14. Under **Current Documents**, you will see that the Self-evaluation status is checked as “**Completed**.” You can also monitor the status of your review.

**NOTE:** If you need to add something after you have completed it, ask your manager to reopen the document. This will reset the status to “**in progress**” and enable you to go back in and make changes.
Upward Feedback
15. You may receive an email from your manager’s leader inviting you to provide feedback about your supervisor. If this is the case for you, log into Self-Service > Performance Management and select Other’s Performance Documents.

16. Select the name of the person you were asked to provide upward feedback and Accept to continue.

17. Then select Performance Document to access the form.
18. Provide your feedback in the space underneath each question in Comments. Responses to all 3 questions are not required.

Note that your actual name is removed.
19. If you are not finished and need to leave, select Save. Otherwise, choose Complete.

20. Select Complete again to confirm you are done and send your upward feedback to your supervisor’s leader.

21. Select OK to finish.
• If you did not receive an invitation to provide upward feedback about your supervisor and still wish to do so, go to http://www.hr.emory.edu/eu/performancemanagement/performance.html
• Download the upward feedback form and complete.
• Suggestions on how to submit anonymously:
  – Put the completed form in an envelope and place it in the appropriate mail box
  – Return the form to the division/school’s HR department, who will then redirect the document accordingly