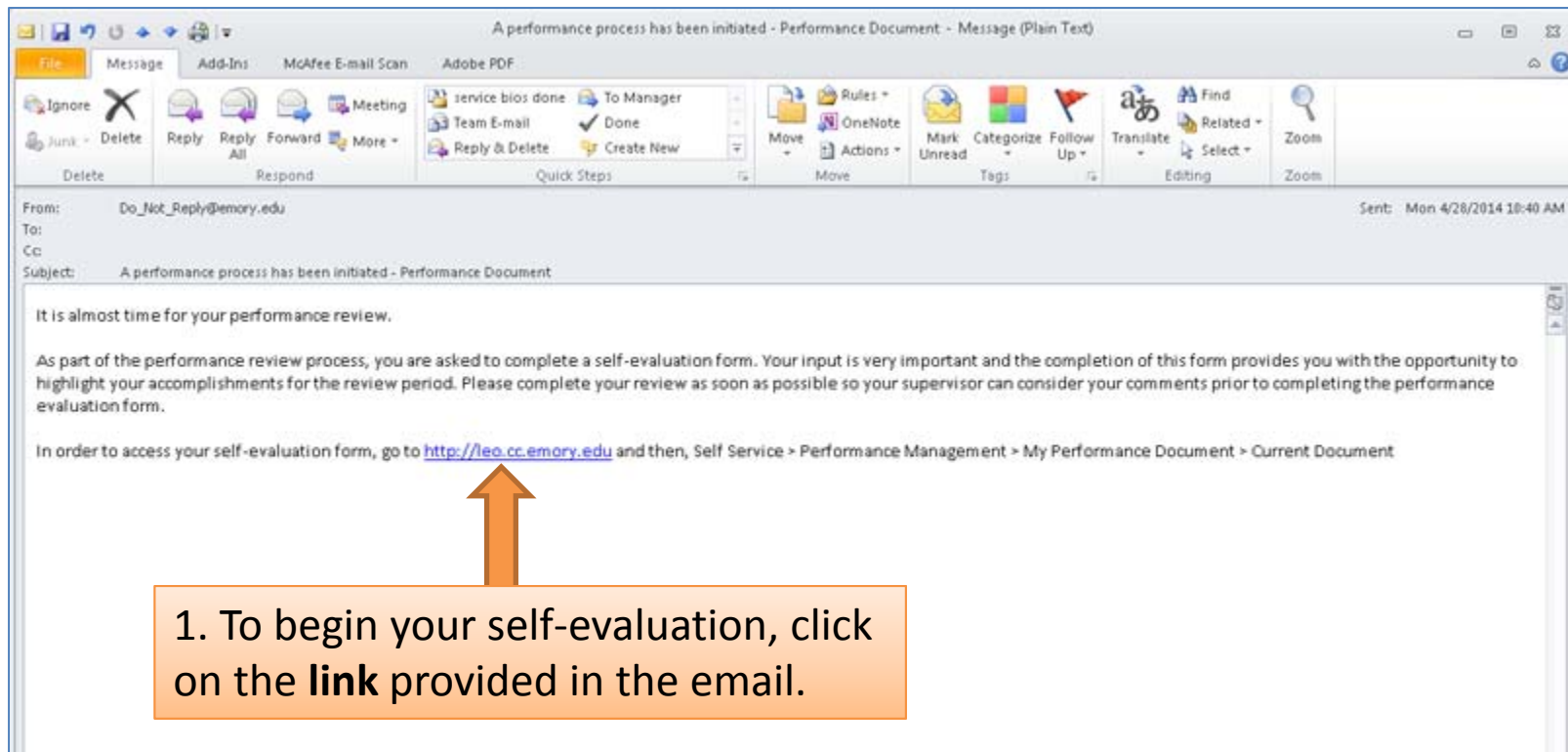


# **Step-by-Step Guide to the Online Performance Management Tool for Employees**



2017

When it is time for you to do a self-evaluation, your manager will begin the process and you will receive an automatic email.



A performance process has been initiated - Performance Document - Message (Plain Text)

From: Do\_Not\_Reply@emory.edu Sent: Mon 4/28/2014 10:40 AM  
To:  
Cc:  
Subject: A performance process has been initiated - Performance Document

It is almost time for your performance review.

As part of the performance review process, you are asked to complete a self-evaluation form. Your input is very important and the completion of this form provides you with the opportunity to highlight your accomplishments for the review period. Please complete your review as soon as possible so your supervisor can consider your comments prior to completing the performance evaluation form.

In order to access your self-evaluation form, go to <http://leo.cc.emory.edu> and then, Self Service > Performance Management > My Performance Document > Current Document

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.

**Main Menu**

[Important New Hire Information](#)

**Self Service**  
Navigate to your self service information and activities.

- [MyEmory](#)
- [Emory Custom](#)
- [Gift Reporting](#)
- [16 More...](#)

**Manager Self Service**  
Navigate to self service information and activities for people reporting to you.

- [ERS Single Signon](#)
- [Emory Learning Management Sys](#)
- [Exempt Leave Tracking](#)
- [4 More...](#)

**Benefits**  
Select benefit plans, track company cars & FMLA, calculate leave accrual & annuity, maintain primary job, NDT, FSA details, auto enrollment, COBRA, and merchants.

- [Employee/Dependent Information](#)

**Set Up HRMS**  
Define installation and system setup tables.

- [Common Definitions](#)

3. Under Performance Management, click on **My Performance Documents**

**Payroll and Compensation**  
Review your pay and compensation history. Update your direct deposit and other deduction or contribution information.

- [View Paycheck](#)
- [Georgia G4 Data](#)
- [Direct Deposit](#)
- [3 More...](#)

**Performance Management**  
Access your performance and development documents, and evaluations you have done for others.

- [My Performance Documents](#)

4. Click **Current Documents**



Favorites | Main Menu > Self Service

Main Menu

**My Performance Documents**  
Create, update, or view your performance documents.

**Current Documents**  
Update or view your performance documents for the current period.

5. Click **Performance Document**



### Current Performance Documents

Listed below are your current performance documents.

Performance Documents						Personalize   Find         First  1 of 1  Last
Document Type	Begin Date	End Date	Job Title	Status	Manager	
<a href="#">Performance Document</a>	05/04/2016	06/01/2016	Specialist	In Progress	Director	



## Current Performance Documents

### Document Details

Performance Document:

Performance Document Details				
<b>Employee:</b>	John Doe	<b>Job Title:</b>	Specialist	
<b>Document Type:</b>	Performance Document	<b>Period:</b>	05/04/2016 - 06/01/2016	
<b>Template:</b>	EU Non-Mgr Annual(Rate NonMgr)	<b>Document ID:</b>	213	
<b>Manager:</b>		<b>Status:</b>	In Progress	

Document Progress				
Step	Status	Due Date	Action	Next Action
Complete Self Evaluation	 Not Started	06/01/2016		<a href="#">Start</a>
Review Manager Evaluation	 In Progress	06/01/2016		

6. Click **Start** to begin the Self-Evaluation.

[Return to Select Documents](#)



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.

Competencies

Comments are required for all competencies. Click the [Expand](#) link to open competencies.

[Expand](#) [Collapse](#)

**Competency 1: Building Trust**


**Description :**  
HONEST: Behaves and expresses oneself in an open and honest manner. Is consistent in word and actions. Tells the truth even when it is difficult. Shares information accurately, completely, and appropriately.  
COMMITTED: Follows through on assignments and commitments. Supports Emory goals and initiatives. Adheres to all policies and procedures.

**Meets Expectations Behaviors**

- Behaves and expresses oneself in an open and honest manner.
- Shares accurate information.
- Completes almost all assignments on time; informs others when a delay will occur.
- Adheres to all policies and procedures.

[Click here](#) for a full list of Competency behaviors.

Comments:



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.

▼ **Competencies**

Comments are required for all competencies. Click the [Expand](#) link to open competencies.

[Expand](#)      [Collapse](#)

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[Click here](#) for a full list of Competency behaviors.

Comments:



The screenshot shows a web-based evaluation form. At the top, there are five competency categories, each with a right-pointing arrow: 'Competency 4: Communication', 'Competency 5: Taking Initiative', 'Competency 6: Problem Solving', 'Competency 7: Functional Knowledge & Skills', and 'Competency 8: Service to Others/Customers'. Below these is a section titled 'Employee Goals' with a downward-pointing arrow. Under this section, there is a note: '(Optional) If you choose to add a goal(s), you must enter comments.' Below the note are two links: 'Expand' and 'Collapse'. There is a plus sign icon followed by the text 'Add Goal'. Below this is a section titled 'Attachments' with a right-pointing arrow. Under this section, it says 'No Attachments have been added to this document'. Below this text is a plus sign icon followed by the text 'Add Attachment'. Below the attachments section is another section titled 'Audit History' with a right-pointing arrow. At the bottom of the form, there is a note: 'To save changes made to the evaluation, select the Save button. When you are ready, select the Complete button to make the document available to your manager.' Below this note are two buttons: 'Save' and 'Complete'. Three orange callout boxes with arrows point to these elements: one points to the 'Save' button, one points to the 'Add Attachment' link, and one points to the 'Complete' button.

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

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### 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.

Performance Document

## Complete Evaluation Confirmation

Your self-evaluation is finalized and marked as "Complete".

OK

13. The self-evaluation is finalized and marked as **Complete**. Click **OK**. It will then appear in your **Historical Documents**.

EMORY


Favorites | Main Menu > Self Service

Main Menu

### My Performance Documents

Create, update, or view your performance documents.

 **Current Documents**  
Update or view your performance documents for the current period.

 **Historical Documents**  
View your completed performance documents.

EMORY

Favorites | Main Menu > Self Service > Performance Management > My Performance Documents >

### Current Performance Documents

#### Document Details

Performance Document: [ID]

You have successfully completed your evaluation.

Performance Document Details			
Employee:	Test Employee #2	Job Title:	Accounting Assistant, Senior
Document Type:	Performance Document	Period:	05/04/2016 - 06/01/2016
Template:	EU Non-Mgr Annual(Rate NonMgr)	Document ID:	
		Status:	In Progress

Document Progress				
Step	Status	Due Date	Action	Next Action
Complete Self Evaluation	<input checked="" type="checkbox"/> Completed	06/01/2016	<a href="#">View</a>	
Review Manager Evaluation	<input type="checkbox"/> In Progress	06/01/2016		

[Return to Select 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.

Main Menu

## Performance Management

Access your performance and development documents, and evaluations you have done for others.

### My Performance Documents

Create, update, or view your performance documents.

- [Current Documents](#)
- [Historical Documents](#)

### Other's Performance Documents

Accept, decline, update or view performance evaluations for other individuals.

- [Pending Evaluation Requests](#)
- [Current Evaluations](#)
- [Historical Evaluations](#)

### Pending Evaluation Requests

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

Pending Evaluation Requests			
	Name	Document Type	Due Date
<input checked="" type="checkbox"/>	Mike Manager	Performance Document	06/01/2016

[Select All](#) [Deselect All](#)

### My Current Evaluations for Others

You have successfully accepted the selected evaluations.

17. Then select Performance Document to access the form.

Current Evaluations for Others				
Employee	Document Type	Begin Date	End Date	Status
	<a href="#">Performance Document</a>	05/04/2016	06/01/2016	In Progress

[View My Historical Evaluations for Others](#)

**Performance Document**  
**Direct Report Evaluation**

Mike Manager Mgr. Training  
Performance Document

**Author:** Direct Report1      **Role:** Direct Report  
**Status:** In Progress      **Due Date:** 06/01/2016  
**Approval:** Not Required

Employee Data

**Empl ID:** 0378411  
**Department:** 160070      HR: Learning & Organization Dvl

Job Summary

Reminder: Your name will not be shared or directly associated with your comments.

 [Return to Document Detail](#)

[Expand All](#)      [Collapse All](#)      [Expand Sections](#)

Direct Report Comments

[Expand](#)      [Collapse](#)

Strengths

Description : What do you see as your supervisors greatest strengths?

Comments:  

Note that your actual name is removed.



18. Provide your feedback in the space underneath each question in Comments. Responses to all 3 questions are not required.



19. If you are not finished and need to leave, select Save. Otherwise, choose Complete.

**Audit History**

Created By:	Direct Report1	06/01/2016	4:14:38PM
Last Modified By:	Direct Report1	06/01/2016	4:14:38PM

Reminder: Your name will not be shared or directly associated with your comments.

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 [Return to Document Detail](#)

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

Performance Document

**Complete Evaluation**

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

Reminder: Your name will not be shared or directly associated with your comments.

Performance Document

**Complete Evaluation Confirmation**

Your evaluation of your manager is finalized and marked as "Complete".

Reminder: your name will not be shared or directly associated with your comments.

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