

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

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# Performance Management User Guide

## Introduction to Performance Management

The Performance Management Cycle consists of the following steps

1. Launching the Annual Performance Management Cycle
2. Making Periodic Updates based on observed behaviors
3. Mid-year Review
4. Annual Review and Evaluation

This document will cover the steps needed to launch a new performance management cycle.

For questions or concerns please contact Learning and Organizational Development at x77844.

## Performance Management User Guide

### Manager's Edition: Launching a New Performance Management Cycle

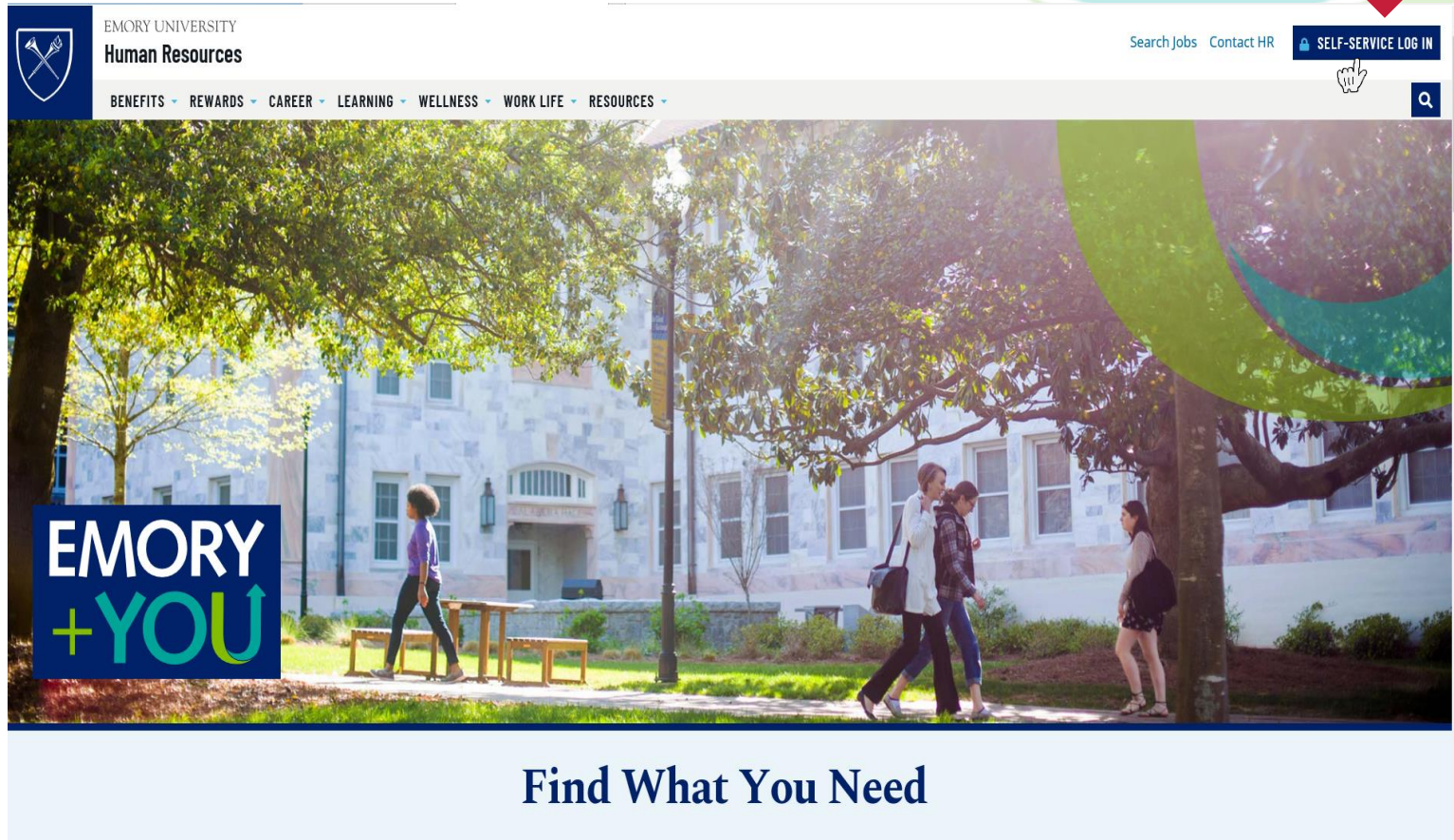
Forms must be created to begin the Performance Management process. In many cases this will be done automatically for you by HR. If this is the case for you, skip to page 12. If you do need to create forms for your employees, those steps are outlined in the pages 1-11.

Once forms have been created, the first step of the performance management process in PeopleSoft 9.2 is called the "Start" step. Here you will establish the competencies, goals and/or responsibilities for use in driving feedback and evaluation throughout the year. Most people will just want the eight required competencies that you have used in the past. But some may want to add additional competencies, as well as goals and key responsibilities specific to the person you are managing. This is an opportunity for you and your employee(s) to determine what criteria should be included in the Mid-Year and End-Of-Year Review.

For questions or concerns please contact Learning and Organizational Development at x77844.

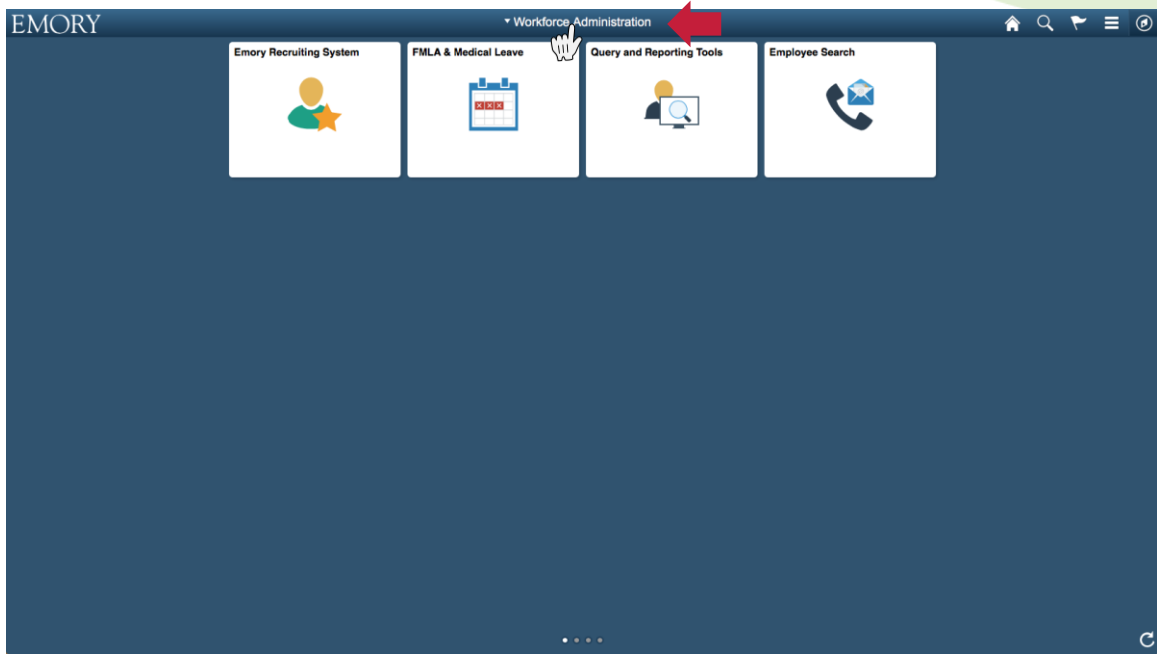


1) Begin by going to the Human Resources page ([www.hr.emory.edu](http://www.hr.emory.edu)) and selecting "Self-Service Login."

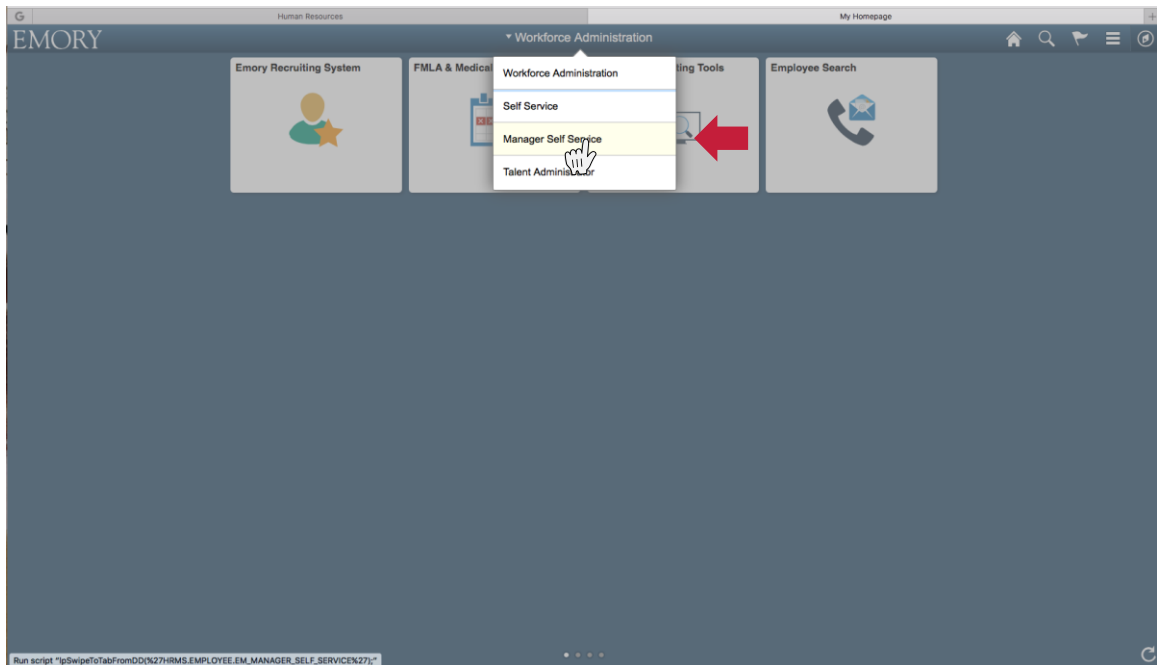


2) Type in your user name (Network ID) and password.

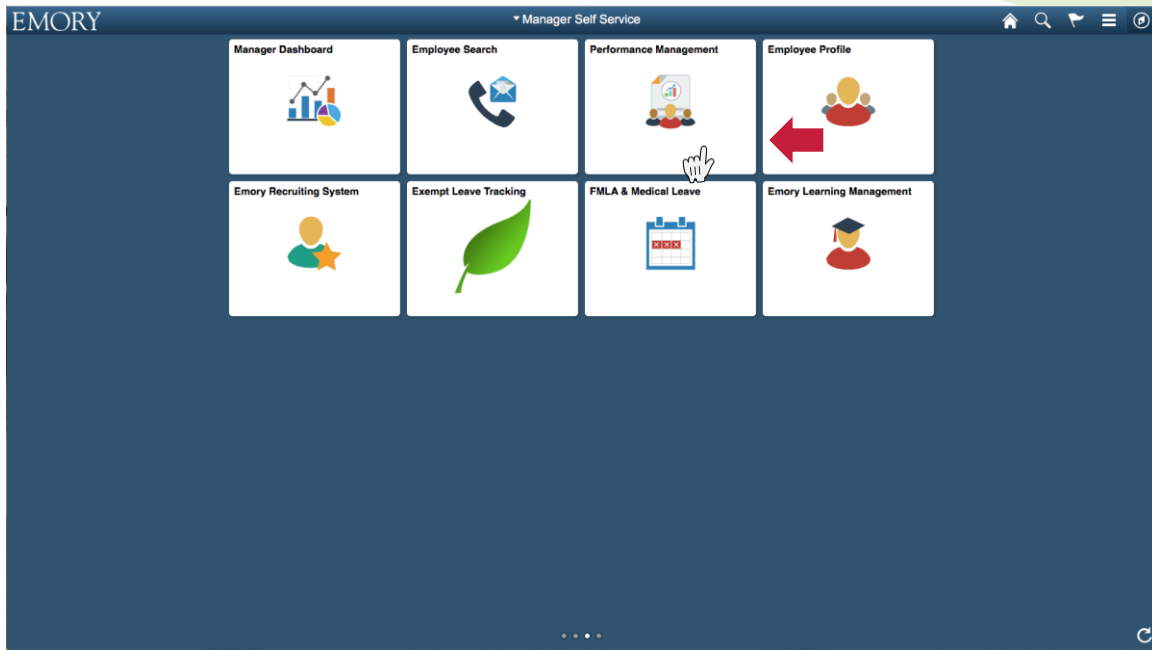
3) Click on the dropdown menu labeled “Workforce Administration.”



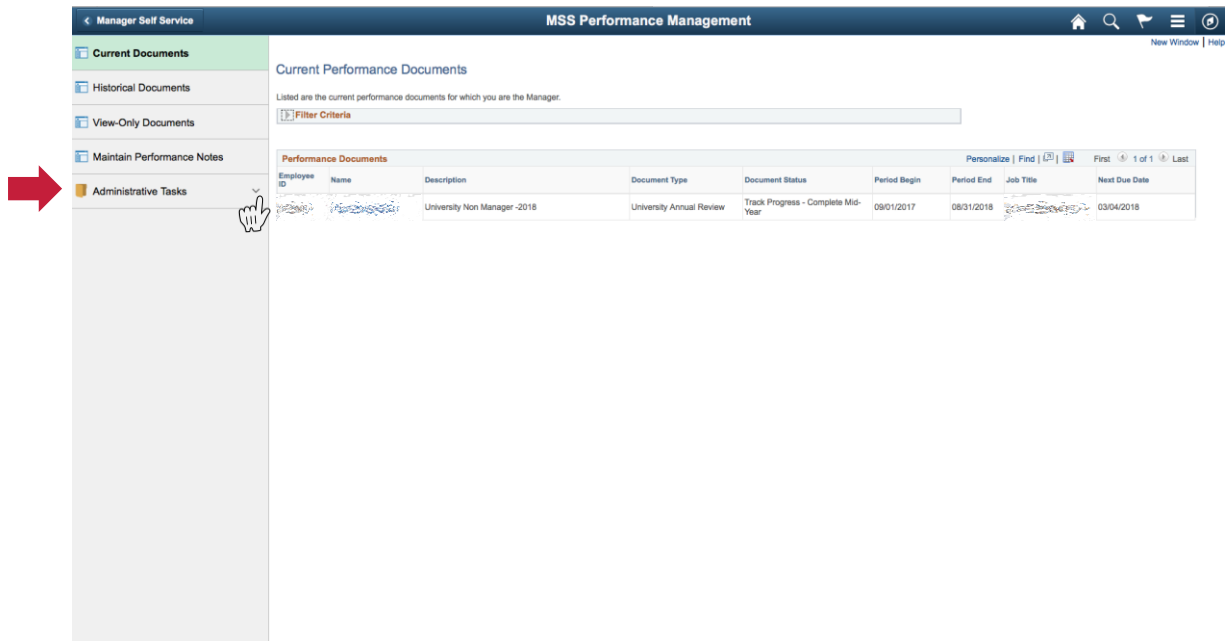
4) Select “Manager Self Service.”



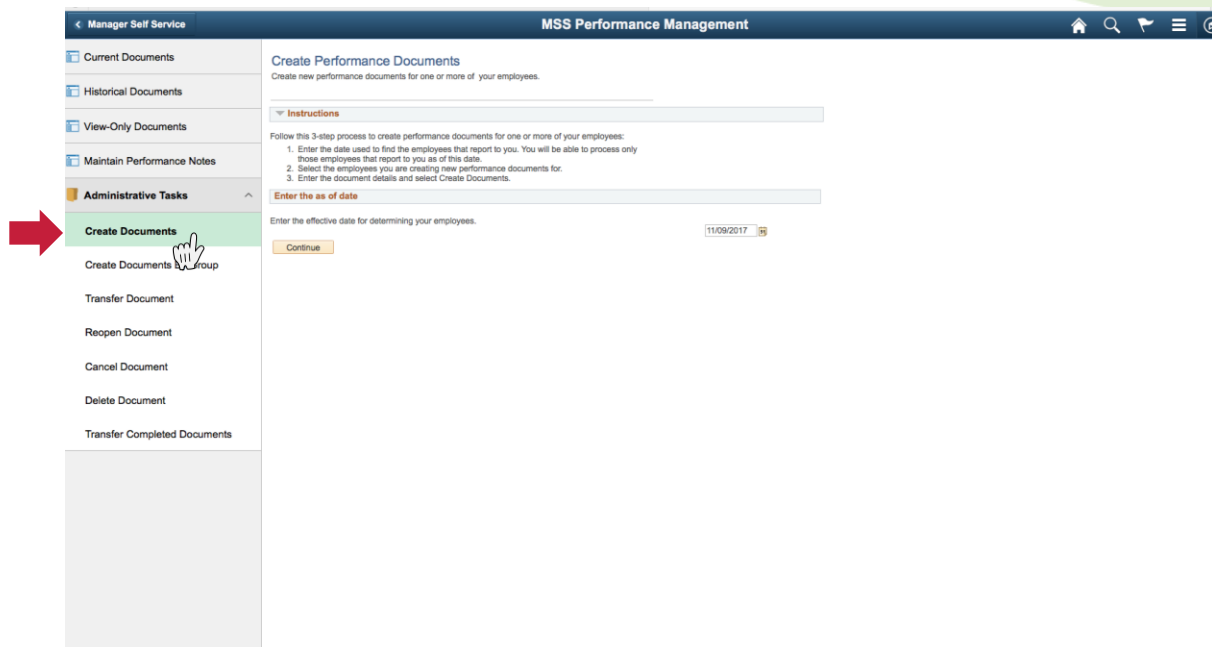
5) Click on the “Performance Management” Tile.



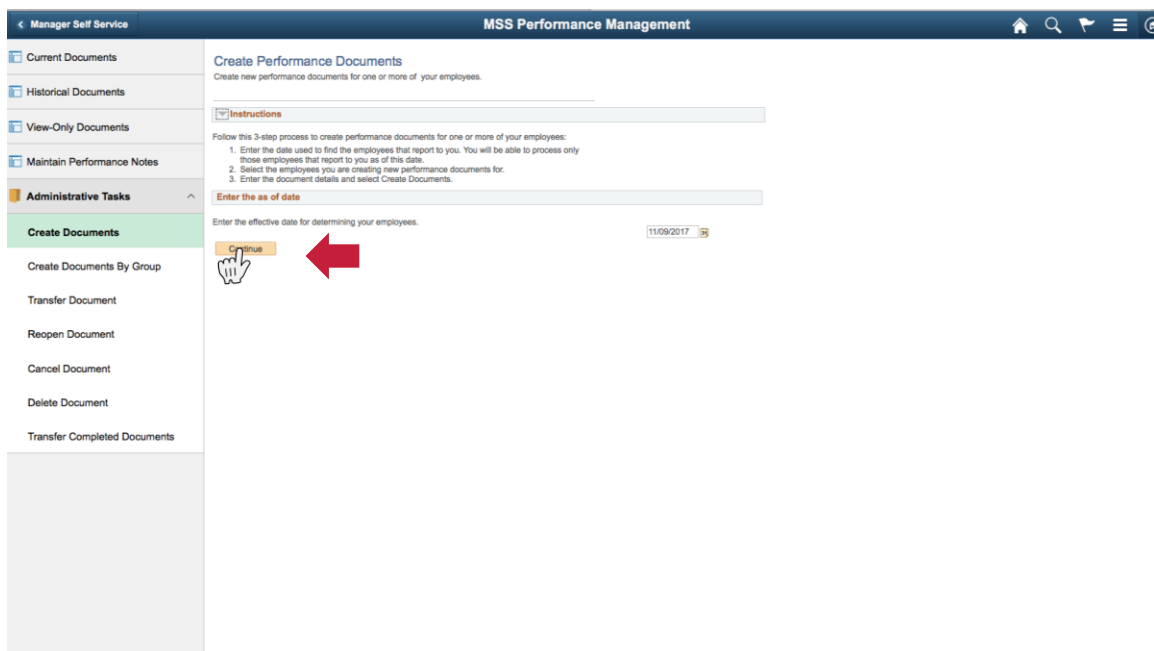
6) Check to see if forms have already been created for your employees. If so, skip to step 17 (page 12). If not, click the drop down on “Administrative Tasks.”



7) Click on “Create Documents.”



8) Select “Continue.”



9) Select employee for whom you want the form by clicking the check box next to their name.

**Create Performance Documents**  
Select the employees to create new performance documents for.

**Instructions**  
Select the employees you are creating new performance documents for.  
Once you have finished select Continue to enter the document details.

[Return to Previous Page](#) [View Selected Employees](#)

**Select Employees**  
Reports To: [Dropdown] As Of: 11/09/2017

Select	Name	Empl ID	HR Status	Job Code Description	Department
<input checked="" type="checkbox"/>	[Employee Name]	[Employee ID]	[HR Status]	[Job Code Description]	HR Learning & Organization Dev

[Continue](#)

10) Select "Continue."

**Create Performance Documents**  
Select the employees to create new performance documents for.

**Instructions**  
Select the employees you are creating new performance documents for.  
Once you have finished select Continue to enter the document details.

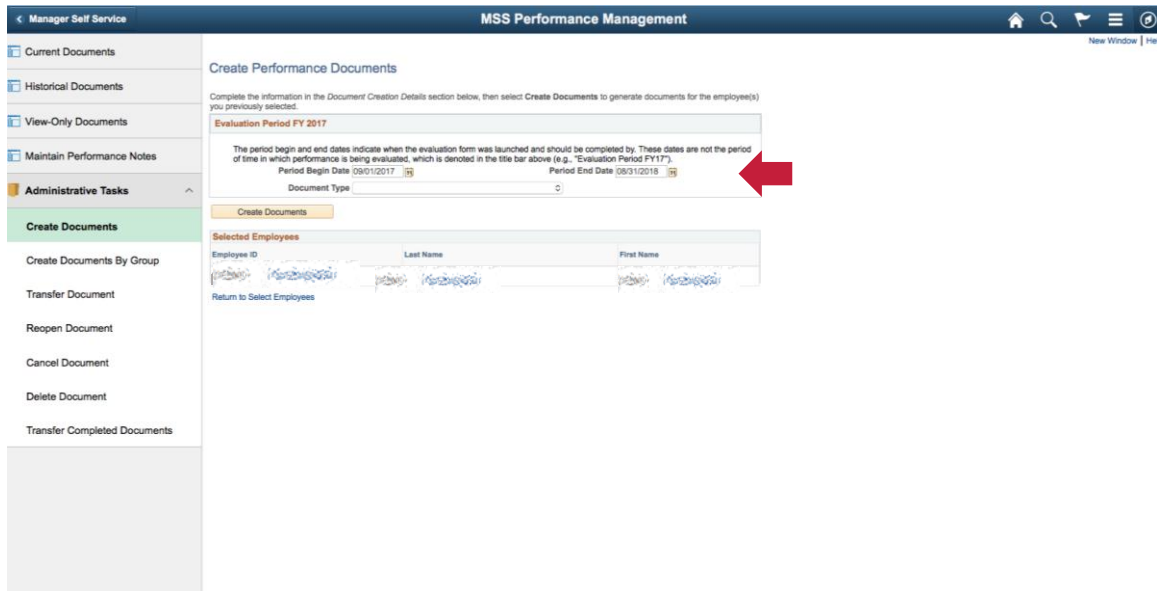
[Return to Previous Page](#) [View Selected Employees](#)

**Select Employees**  
Reports To: [Dropdown] As Of: 11/09/2017

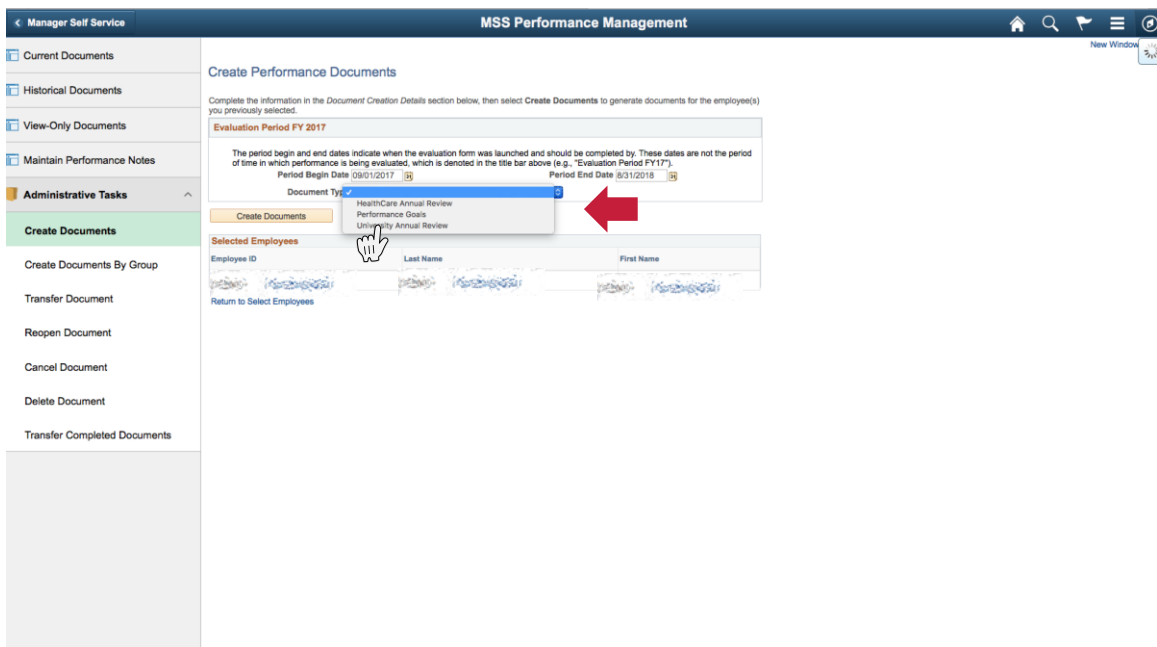
Select	Name	Empl ID	HR Status	Job Code Description	Department
<input checked="" type="checkbox"/>	[Employee Name]	[Employee ID]	[HR Status]	[Job Code Description]	HR Learning & Organization Dev

[Continue](#)

- 11) The form will ask what the start and end dates are for the employee. If it is NOT an new employee, these dates will be the beginning and end of the review cycle (either the fiscal or academic year). If the employee IS new, the start date will be their hire date, and the end of the year. Enter the dates.



- 12) Select the “Document Type” dropdown and select “University Annual Review.”



- 13) Select the “Template” dropdown and select the “University Leader,” “University Manager” or “University Non-Manager” template depending on the person you are rating.

**Manager Self Service** **MSS Performance Management**

**Create Performance Documents**

Complete the information in the Document Creation Details section below, then select Create Documents to generate documents for the employee(s) you previously selected.

**Evaluation Period FY 2017**

The period begin and end dates indicate when the evaluation form was launched and should be completed by. These dates are not the period of time in which performance is being evaluated, which is denoted in the title bar above (e.g., "Evaluation Period FY17").

Period Begin Date 09/01/2017 Period End Date 09/31/2018

Document Type University Annual Review

Template

Create Documents

Selected Employees

Employee ID First Name

Return to Select Employees

- 14) Click on “Create Documents.”

**Manager Self Service** **MSS Performance Management**

**Create Performance Documents**

Complete the information in the Document Creation Details section below, then select Create Documents to generate documents for the employee(s) you previously selected.

**Evaluation Period FY 2017**

The period begin and end dates indicate when the evaluation form was launched and should be completed by. These dates are not the period of time in which performance is being evaluated, which is denoted in the title bar above (e.g., "Evaluation Period FY17").

Period Begin Date 09/01/2017 Period End Date 09/31/2018

Document Type University Annual Review

Template University Non Manager -2018

Create Documents

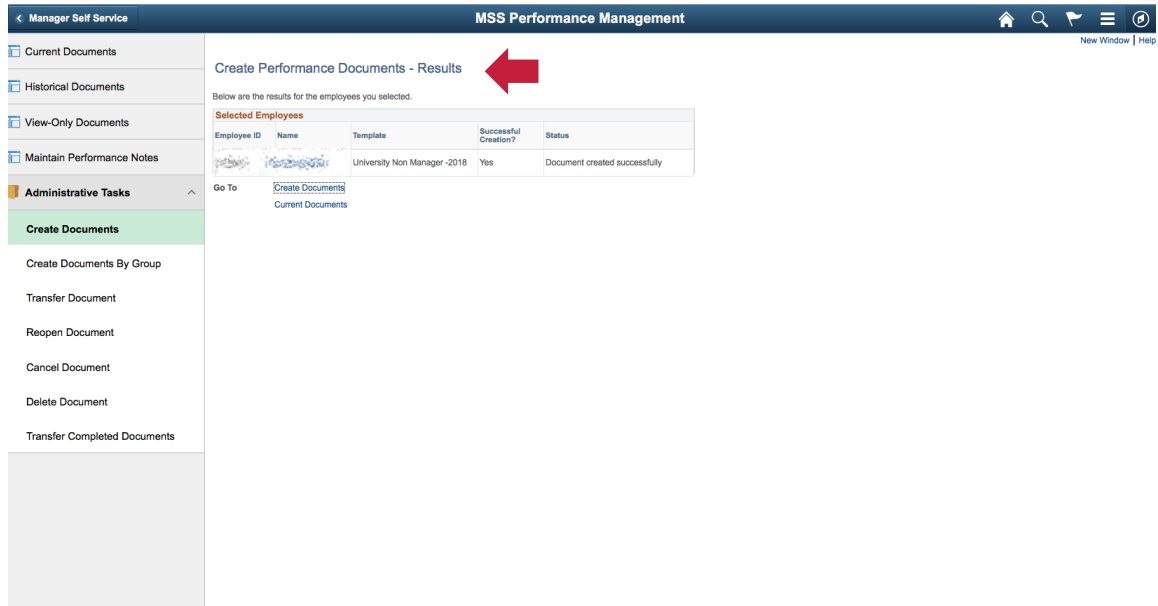
Selected Employees

Employee ID Last Name First Name

Return to Select Employees



15) You will be returned to this screen.



**Manager Self Service** **MSS Performance Management** New Window | Help

**Current Documents**

**Historical Documents**

**View-Only Documents**

**Maintain Performance Notes**

**Administrative Tasks**

**Create Documents**

Create Documents By Group

Transfer Document

Reopen Document

Cancel Document

Delete Document

Transfer Completed Documents

**Create Performance Documents - Results**

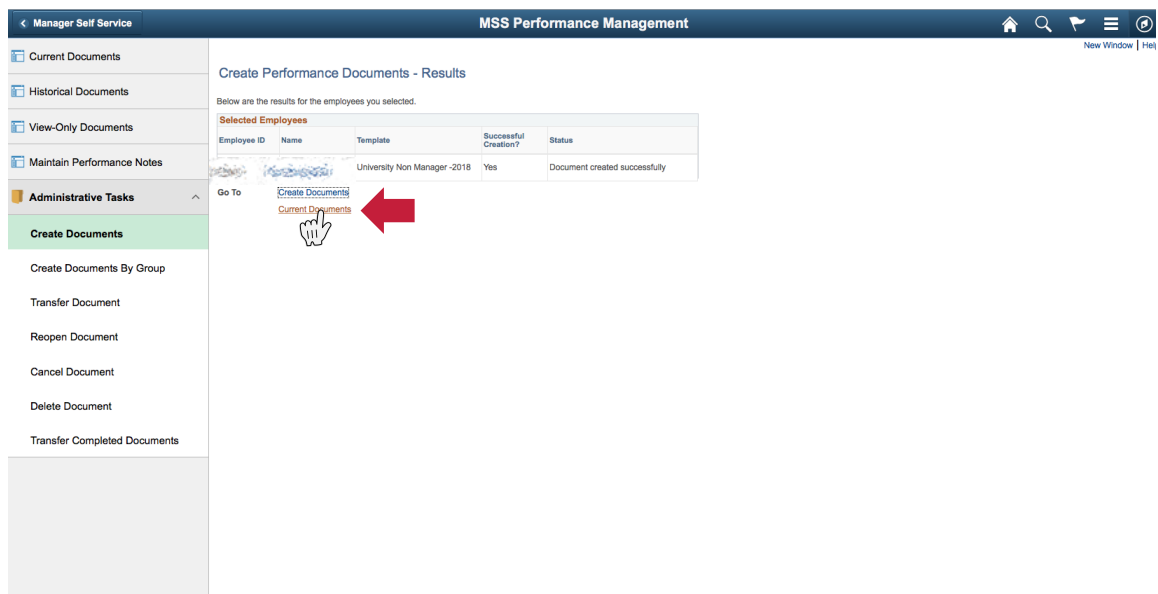
Below are the results for the employees you selected.

**Selected Employees**

Employee ID	Name	Template	Successful Creation?	Status
		University Non Manager -2018	Yes	Document created successfully

Go To [Create Documents](#) [Current Documents](#)

16) Click on “Current Documents” to find the document you just made.



**Manager Self Service** **MSS Performance Management** New Window | Help

**Current Documents**

**Historical Documents**

**View-Only Documents**

**Maintain Performance Notes**

**Administrative Tasks**

**Create Documents**

Create Documents By Group

Transfer Document

Reopen Document

Cancel Document

Delete Document

Transfer Completed Documents

**Create Performance Documents - Results**

Below are the results for the employees you selected.

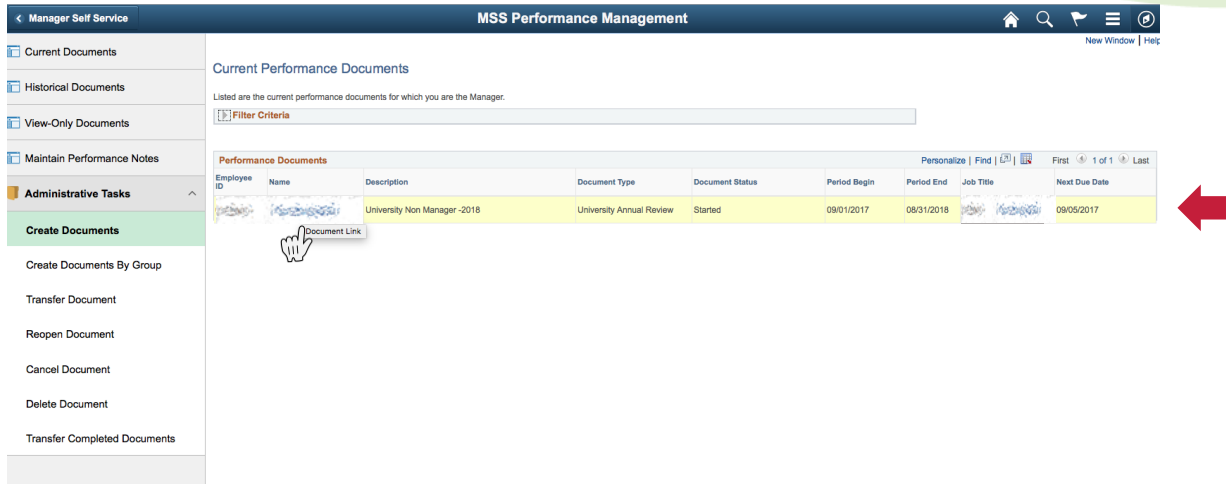
**Selected Employees**

Employee ID	Name	Template	Successful Creation?	Status
		University Non Manager -2018	Yes	Document created successfully

Go To [Create Documents](#) [Current Documents](#)



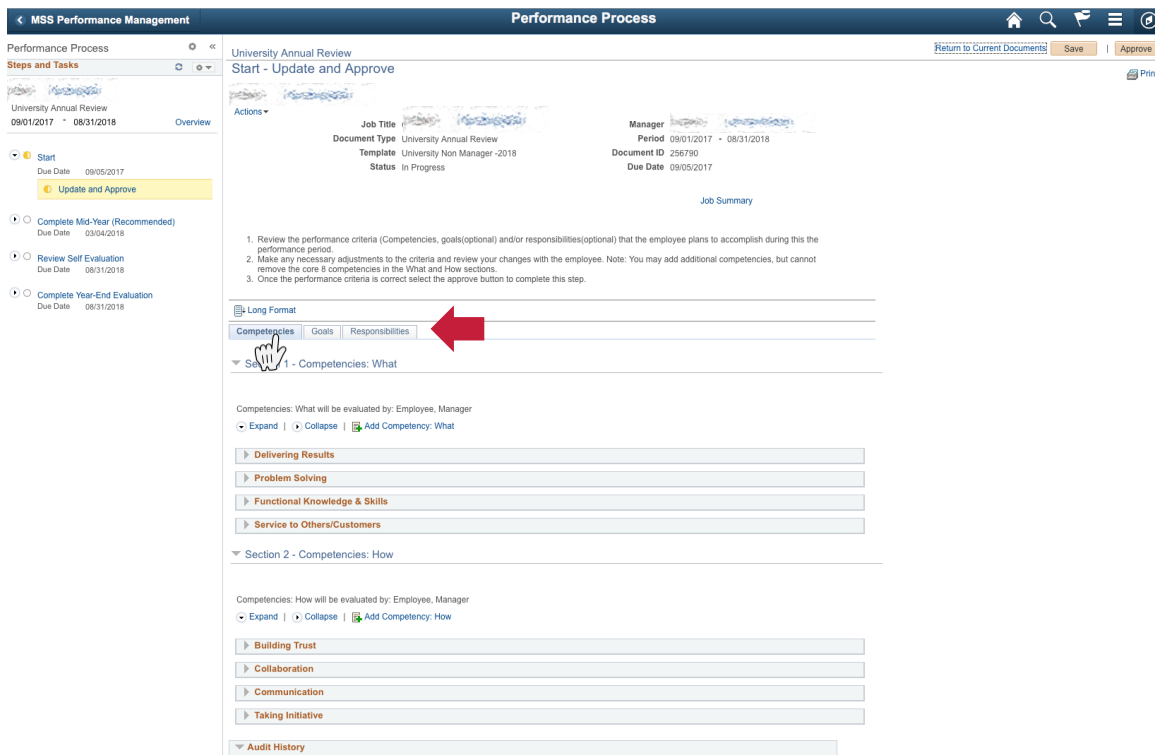
17) Click on the document you just created (or that was already created for you).



The screenshot shows the 'MSS Performance Management' interface. On the left is a sidebar with navigation options: Current Documents, Historical Documents, View-Only Documents, Maintain Performance Notes, and Administrative Tasks. The 'Administrative Tasks' section is expanded, showing options like 'Create Documents', 'Transfer Document', 'Reopen Document', 'Cancel Document', 'Delete Document', and 'Transfer Completed Documents'. The main area displays 'Current Performance Documents' with a table of documents. The table has columns: Employee ID, Name, Description, Document Type, Document Status, Period Begin, Period End, Job Title, and Next Due Date. A red arrow points to the document 'University Non Manager -2018' which is a 'University Annual Review' document, 'Started' on 08/01/2017, and due on 08/05/2017.

Employee ID	Name	Description	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date
		University Non Manager -2018	University Annual Review	Started	08/01/2017	08/31/2018		08/05/2017

18) You will see the main page for developing your Performance Management Document. The three sections you may edit, Competencies, Goals, and Responsibilities, can be selected with the tabs below.



The screenshot shows the 'Performance Process' page for a 'University Annual Review'. The page has a sidebar with 'Steps and Tasks' including 'Start', 'Update and Approve', 'Complete Mid-Year (Recommended)', 'Review Self Evaluation', and 'Complete Year-End Evaluation'. The main area shows the 'Start - Update and Approve' section with fields for Job Title, Document Type, Template, Status, Manager, Period, Document ID, and Due Date. Below these fields are instructions for reviewing performance criteria. A red arrow points to the 'Competencies' tab, which is selected. The 'Competencies' section is expanded, showing 'Section 1 - Competencies: What' and 'Section 2 - Competencies: How'. Each section has a list of competencies to be evaluated by the employee and manager.

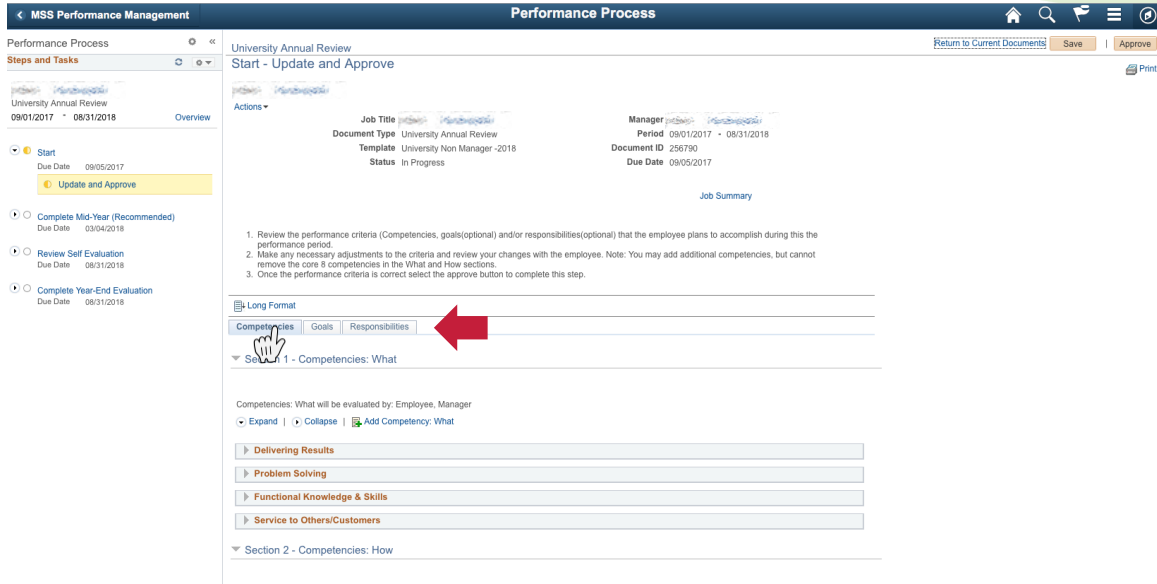
**Section 1 - Competencies: What**

- Delivering Results
- Problem Solving
- Functional Knowledge & Skills
- Service to Others/Customers

**Section 2 - Competencies: How**

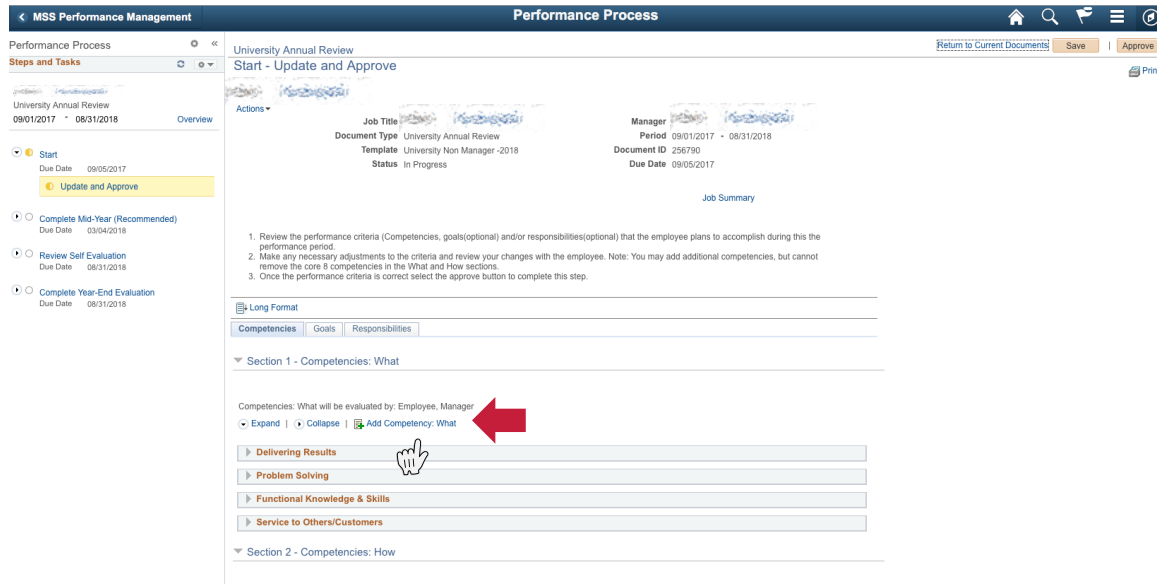
- Building Trust
- Collaboration
- Communication
- Taking Initiative

19) To add additional competencies (optional) beyond the eight core to Emory, click on the “Competencies” tab.



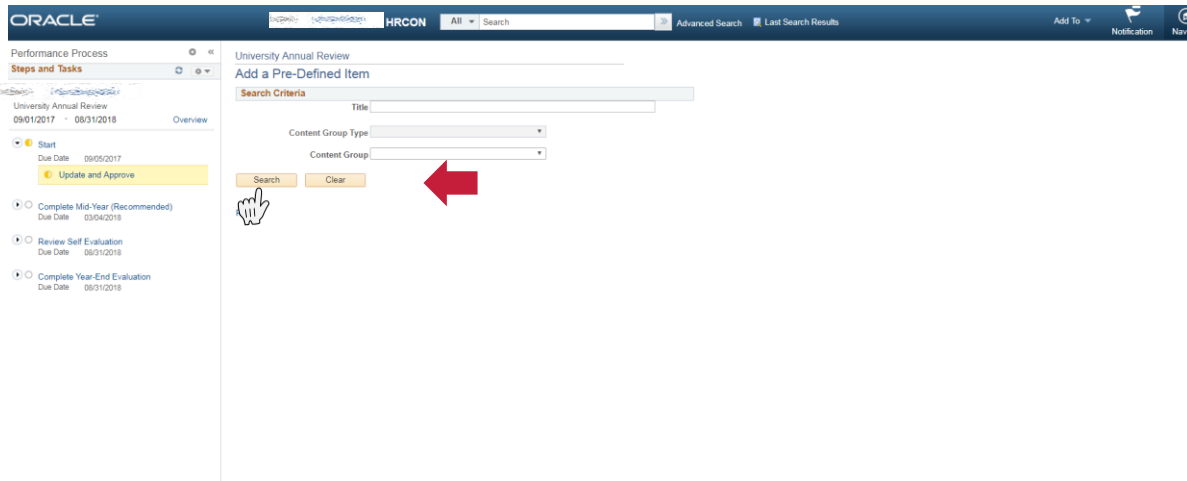
The screenshot shows the 'MSS Performance Management' interface. The 'Performance Process' section is active, displaying 'University Annual Review' with 'Start - Update and Approve' as the current step. The 'Steps and Tasks' sidebar on the left lists various stages, with 'Update and Approve' highlighted. The main content area shows a 'Job Title' of 'University Annual Review' and a 'Manager' of 'University Non Manager -2018'. The 'Competencies' tab is selected, and a red arrow points to the 'Add Competency: What' button. Below this, there are sections for 'Delivering Results', 'Problem Solving', 'Functional Knowledge & Skills', and 'Service to Others/Customers'.

20) Select “Add Competency” (for either the What or How section).



This screenshot shows the same interface as the previous one, but with the 'Add Competency: What' button highlighted by a red arrow. The 'Competencies' tab is still selected, and the 'Section 1 - Competencies: What' is expanded. The 'Add Competency: What' button is located below the 'Expand' and 'Collapse' options. The 'Delivering Results' section is also visible, with a hand cursor icon pointing to it.

21) Custom competencies must be reviewed and placed into the system in advance by HR. Once this has been done, select search to find your custom, HR approved competency.



ORACLE HRCON

Performance Process

Steps and Tasks

University Annual Review

09/01/2017 - 08/31/2018

Overview

Start

Due Date 09/05/2017

Update and Approve

Complete Mid-Year (Recommended)

Due Date 03/04/2018

Review Self Evaluation

Due Date 08/31/2018

Complete Year-End Evaluation

Due Date 08/31/2018

University Annual Review

Add a Pre-Defined Item

Search Criteria

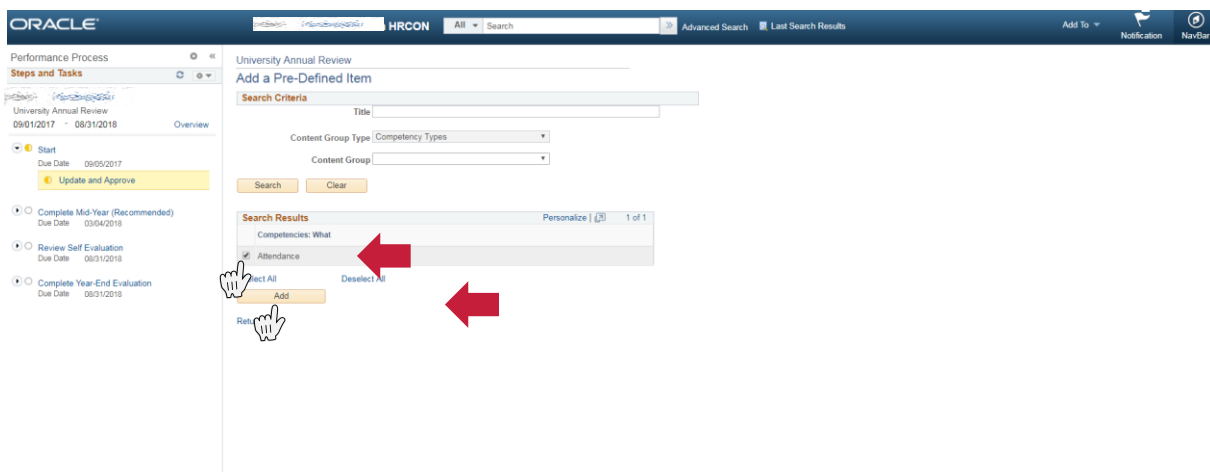
Title

Content Group Type

Content Group

Search Clear

22) In this example, the custom competency available is "Attendance." Check the box next to your custom competency and click "Add."



ORACLE HRCON

Performance Process

Steps and Tasks

University Annual Review

09/01/2017 - 08/31/2018

Overview

Start

Due Date 09/05/2017

Update and Approve

Complete Mid-Year (Recommended)

Due Date 03/04/2018

Review Self Evaluation

Due Date 08/31/2018

Complete Year-End Evaluation

Due Date 08/31/2018

University Annual Review

Add a Pre-Defined Item

Search Criteria

Title

Content Group Type Competency Types

Content Group

Search Clear

Search Results

Personalize | 1 of 1

Competencies: What

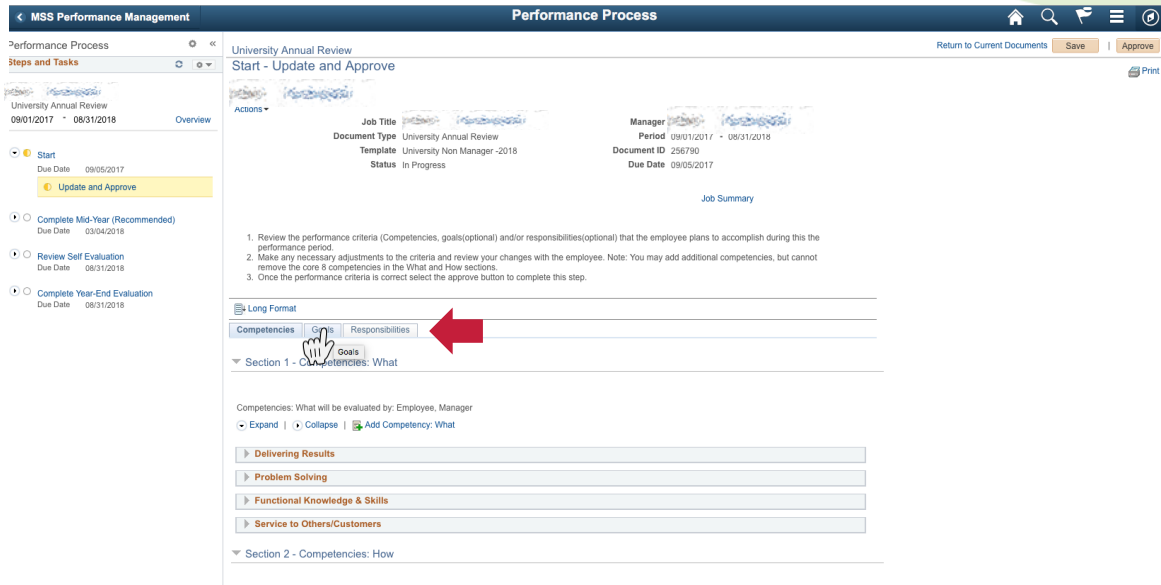
Attendance

Select All Deselect All

Add

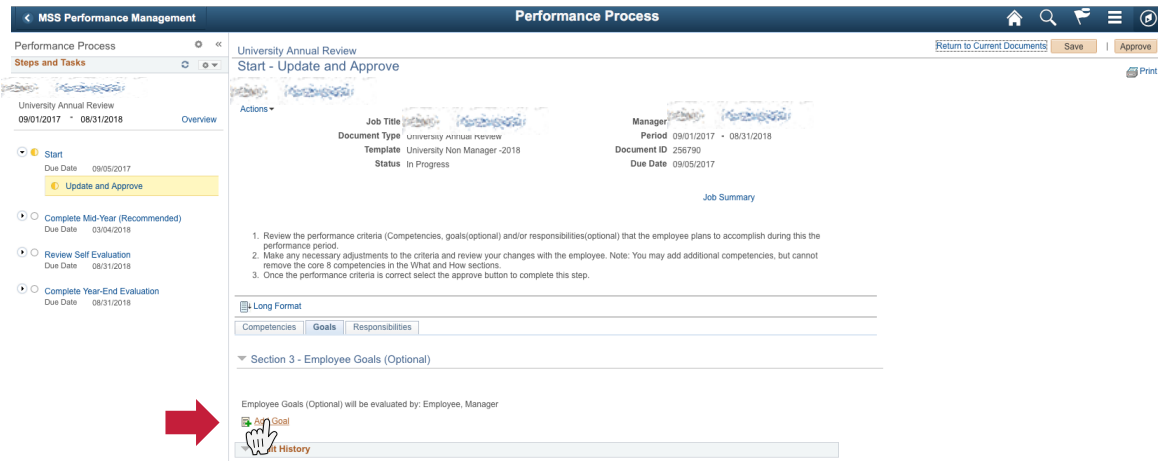
Rel

23) To add or edit goals (optional), click on the “Goals” tab.



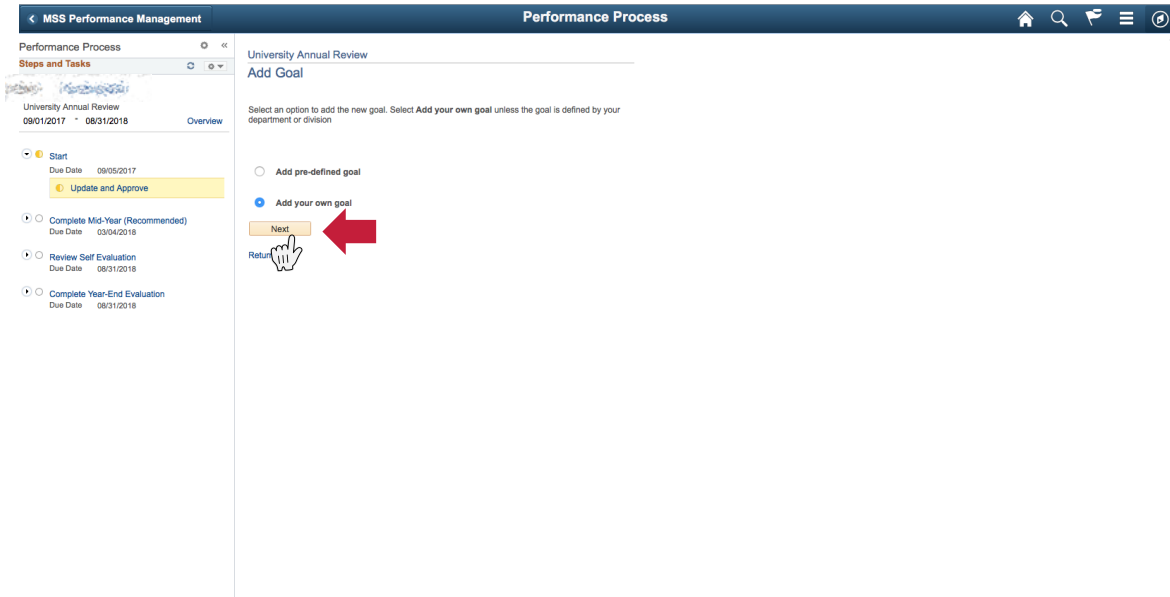
The screenshot shows the 'MSS Performance Management' interface. The 'Performance Process' is 'University Annual Review' and the 'Start - Update and Approve' step is active. The 'Goals' tab is selected under the 'Competencies' section. A red arrow points to the 'Goals' tab. The 'Competencies' section is expanded, showing 'Section 1 - Competencies: What' and 'Section 2 - Competencies: How'. The 'Goals' tab is highlighted with a red arrow.

24) Select “Add Goal.”

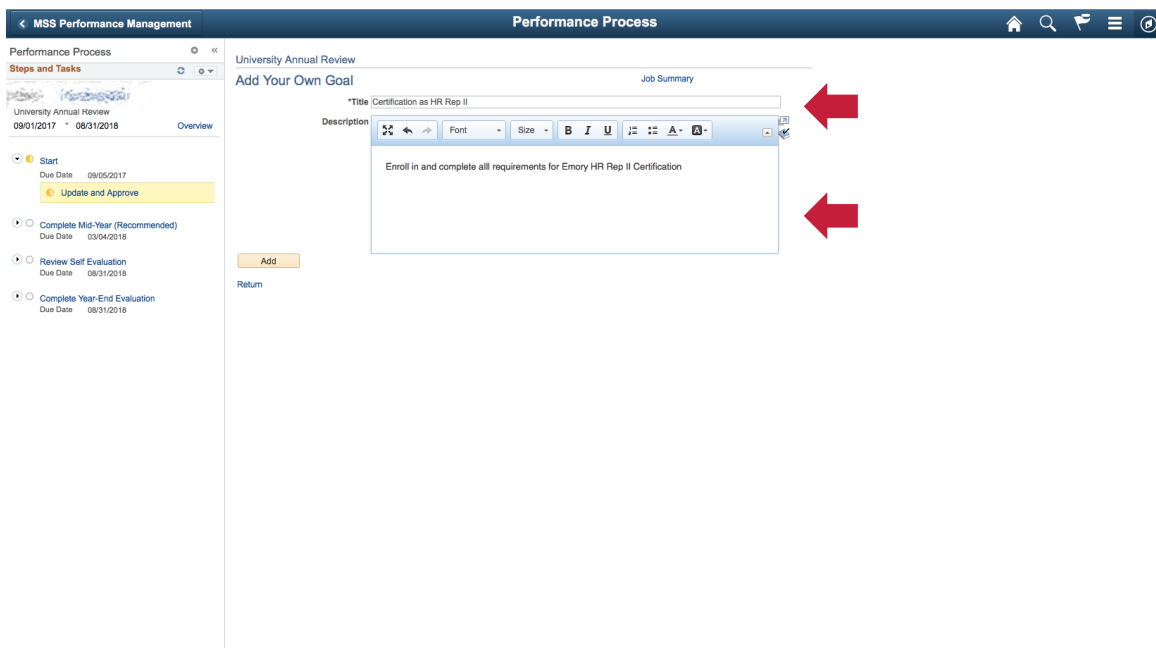


The screenshot shows the 'MSS Performance Management' interface. The 'Performance Process' is 'University Annual Review' and the 'Start - Update and Approve' step is active. The 'Goals' tab is selected under the 'Competencies' section. The 'Employee Goals (Optional)' section is expanded, showing the 'Add Goal' button. A red arrow points to the 'Add Goal' button.

25) Select the type of goal. Some areas will have predefined goals. To make a unique goal, select “Add Your Own Goal”, and then click “Next.”



26) Type in the title of the goal, and add a description. Make sure to refer to the Emory “Goal Setting Tip Sheet” document when defining your goals which is found [here](#).



27) Click on "Add."

**MSS Performance Management** **Performance Process**

Performance Process  
Steps and Tasks

University Annual Review  
09/01/2017 - 08/31/2018

Start  
Due Date: 09/05/2017  
Update and Approve

Complete Mid-Year (Recommended)  
Due Date: 03/04/2018

Review Self Evaluation  
Due Date: 08/31/2018

Complete Year-End Evaluation  
Due Date: 08/31/2018

University Annual Review  
Add Your Own Goal

Title: Certification as HR Rep II

Description: Enroll in and complete all requirements for Emory HR Rep II Certification

Add

28) To add responsibilities (optional), click on the "Responsibilities" tab.

**MSS Performance Management** **Performance Process**

Performance Process  
Steps and Tasks

University Annual Review  
09/01/2017 - 08/31/2018

Start  
Due Date: 09/05/2017  
Update and Approve

Complete Mid-Year (Recommended)  
Due Date: 03/04/2018

Review Self Evaluation  
Due Date: 08/31/2018

Complete Year-End Evaluation  
Due Date: 08/31/2018

University Annual Review  
Start - Update and Approve

Job Title: University Annual Review  
Document Type: University Annual Review  
Template: University Non Manager -2018  
Status: In Progress

Manager: [Name]  
Period: 09/01/2017 - 08/31/2018  
Document ID: 256790  
Due Date: 09/05/2017

Long Format

Competencies | Goals | Responsibilities

Section 1 - Competencies

Competencies: What will be evaluated by: Employee, Manager

Expand | Collapse | Add Competency: What

Delivering Results

Problem Solving

Functional Knowledge & Skills

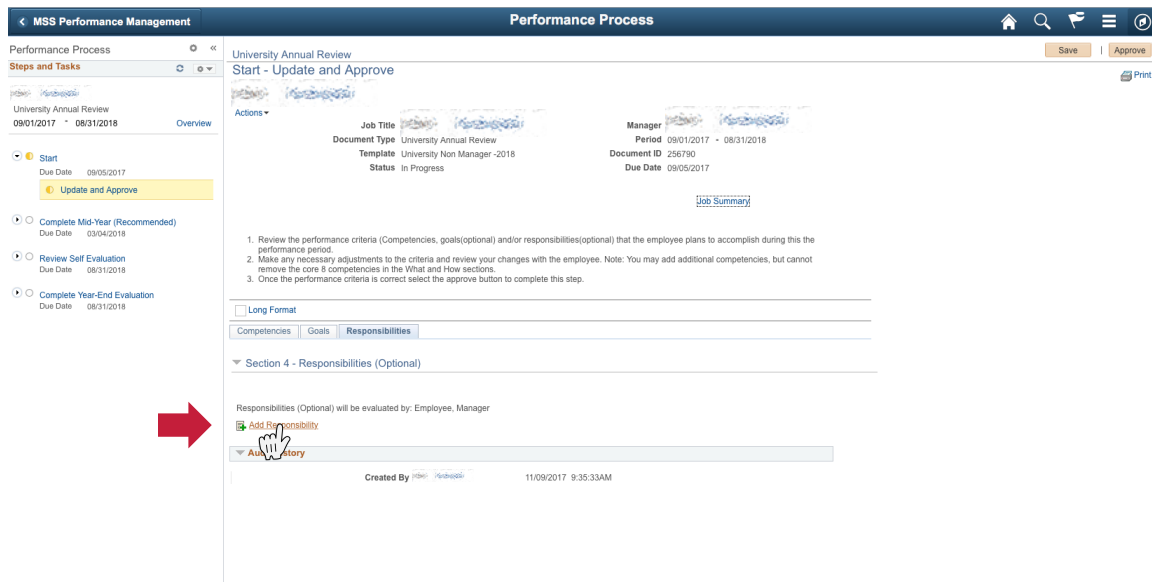
Service to Others/Customers

Section 2 - Competencies: How

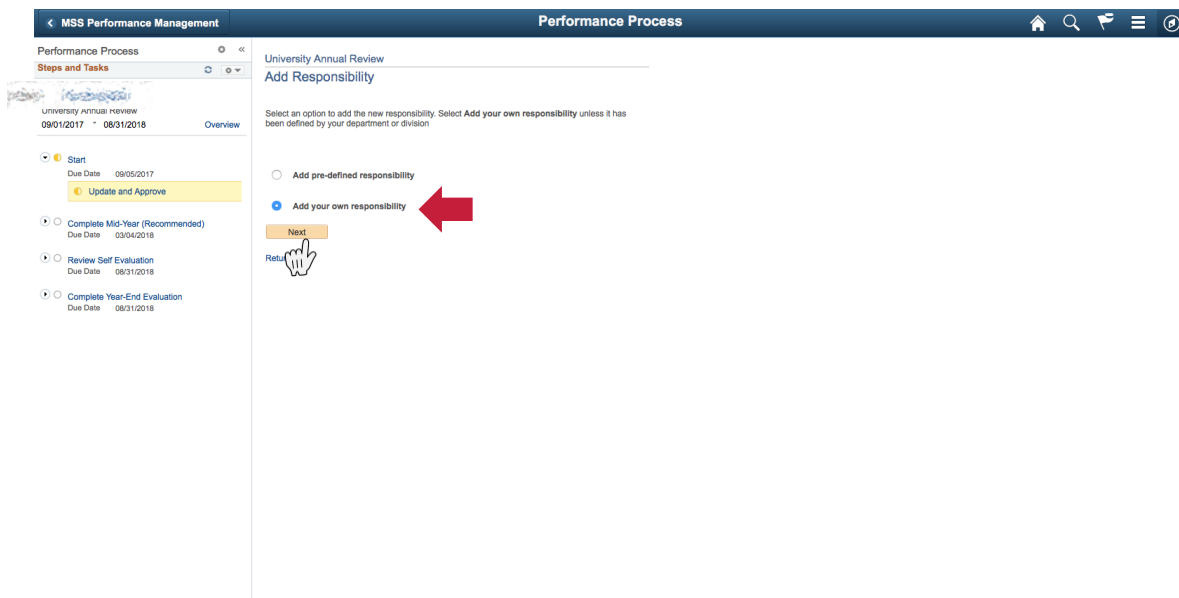
29) Before you include a job responsibility, you can review your employee's job description by clicking on the "Job Summary" link.

30) Your employees job description will launch in a separate window. You can use this description to help identify key responsibilities to emphasize in this year's review.

31) When you are ready to add your responsibilities return to the original internet window, and select “Add Responsibility.”

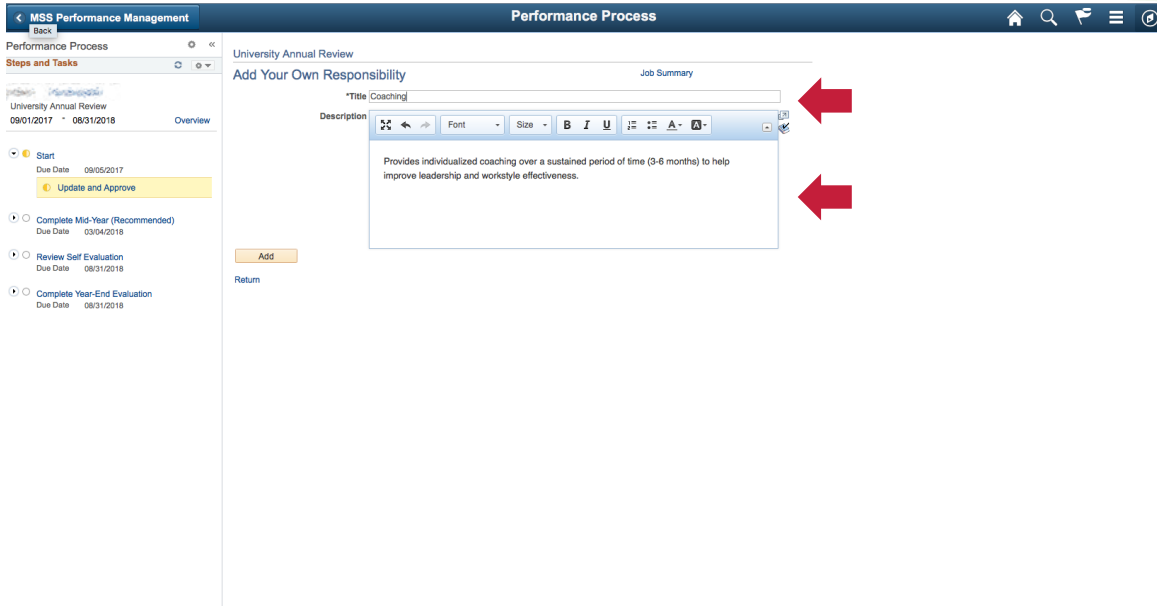


32) Just like goals, you can add predefined responsibility, or create your own. To create your own responsibility select “Add Your Own Responsibility” and click on “Next.”





33) Type in the title and description of the responsibility.



**MSS Performance Management** **Performance Process**

Back

Performance Process

Steps and Tasks

University Annual Review

09/01/2017 - 08/31/2018

Overview

Start

Due Date: 09/05/2017

Update and Approve

Complete Mid-Year (Recommended)

Due Date: 03/04/2018

Review Self Evaluation

Due Date: 08/31/2018

Complete Year-End Evaluation

Due Date: 08/31/2018

**Add Your Own Responsibility**

Job Summary

\*Title Coaching

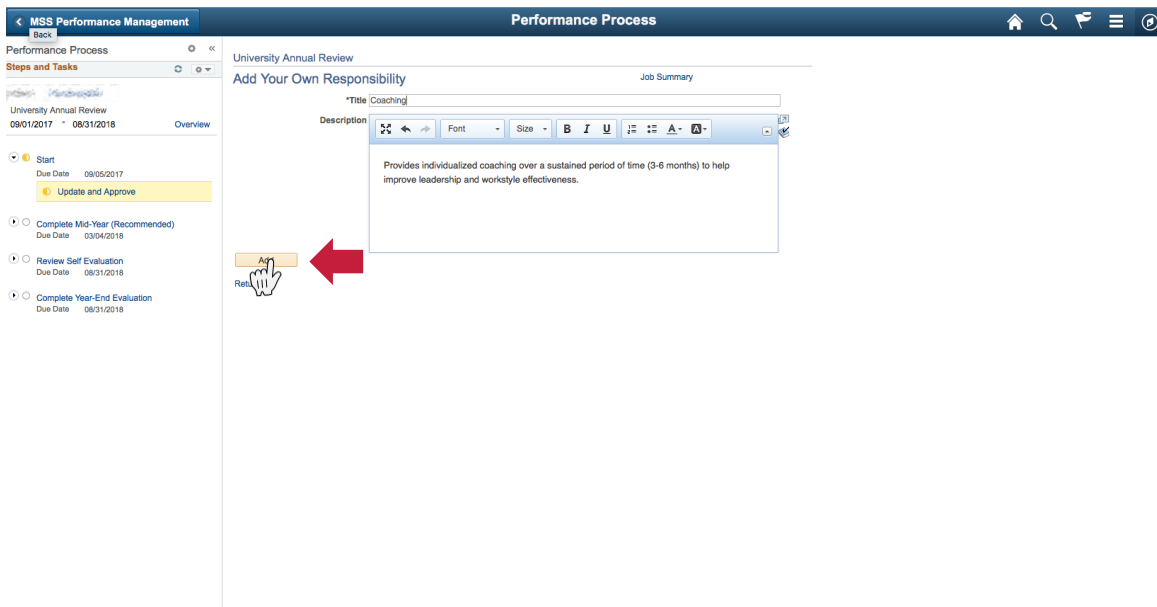
Description

Provides individualized coaching over a sustained period of time (3-6 months) to help improve leadership and workstyle effectiveness.

Add

Return

34) Click "Add."



**MSS Performance Management** **Performance Process**

Back

Performance Process

Steps and Tasks

University Annual Review

09/01/2017 - 08/31/2018

Overview

Start

Due Date: 09/05/2017

Update and Approve

Complete Mid-Year (Recommended)

Due Date: 03/04/2018

Review Self Evaluation

Due Date: 08/31/2018

Complete Year-End Evaluation

Due Date: 08/31/2018

**Add Your Own Responsibility**

Job Summary

\*Title Coaching

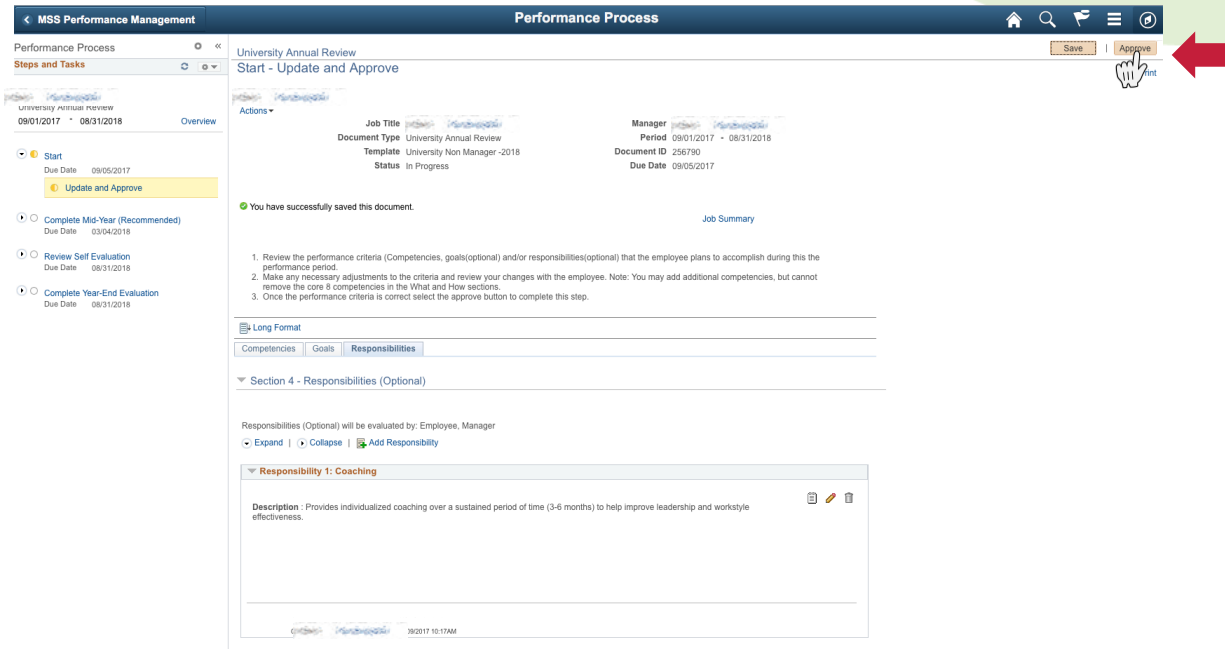
Description

Provides individualized coaching over a sustained period of time (3-6 months) to help improve leadership and workstyle effectiveness.

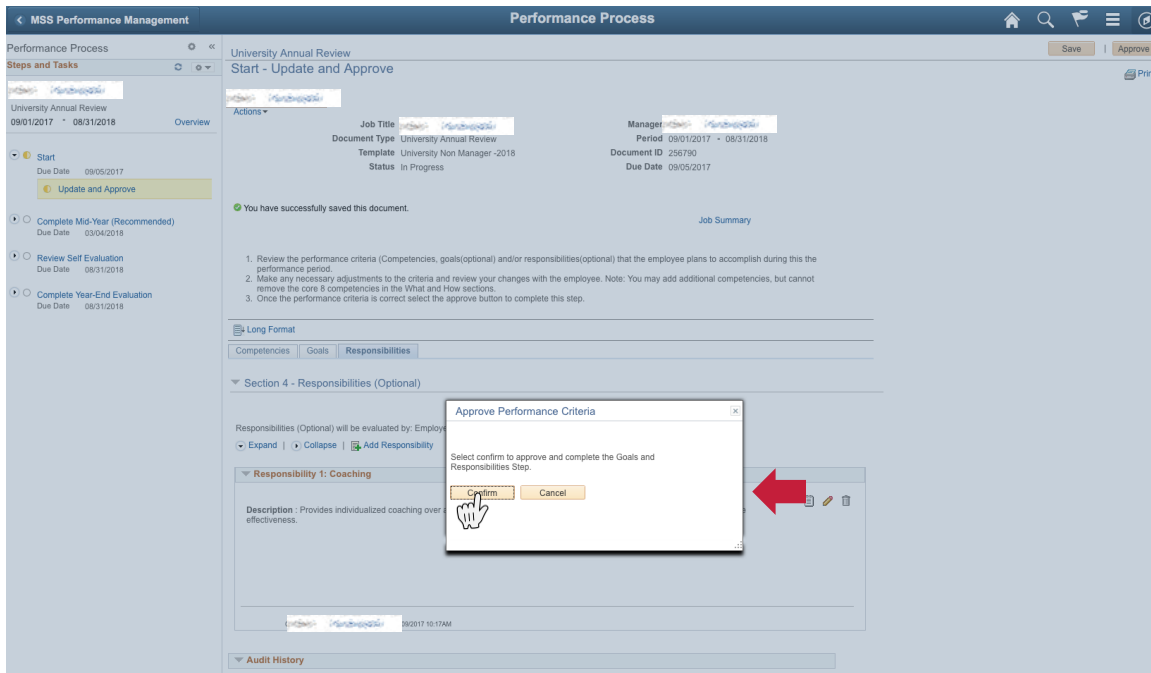
Add

Return

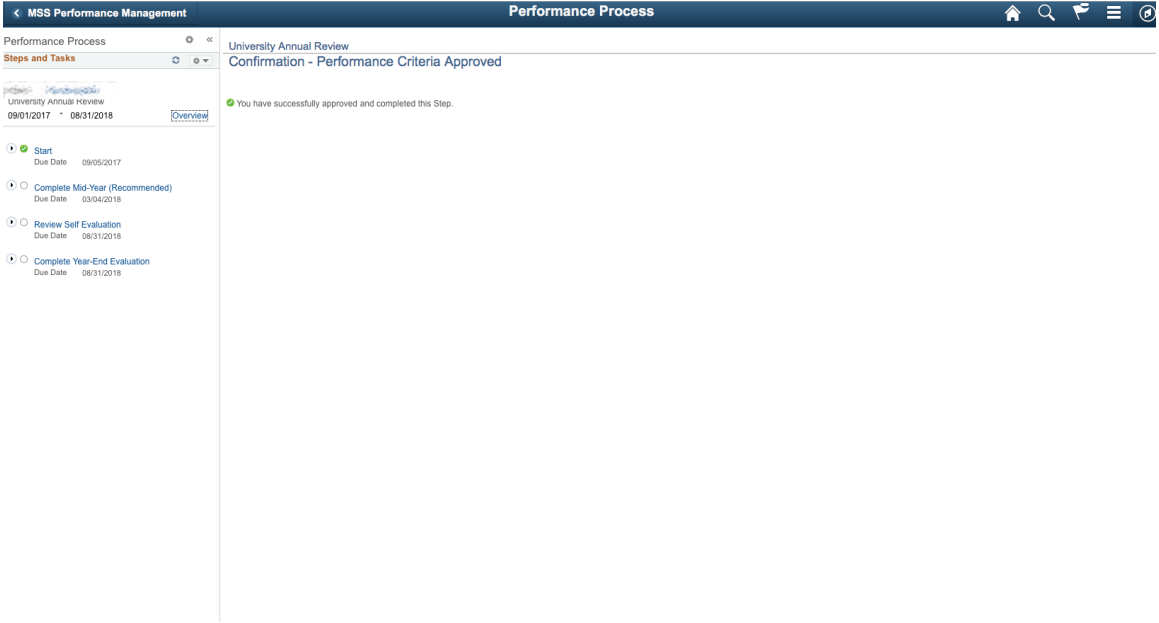
35) When you are done updating competencies, goals, and responsibilities click approve.



36) You will be asked to confirm you would like to approve the new performance criteria. Select confirm to finalize and launch the performance review process.



37) You will receive a confirmation that the performance review criteria has been approved. An e-mail will be sent to your employee with a link to their portion of the performance review process.



The screenshot shows the 'MSS Performance Management' interface. The top navigation bar includes 'Performance Process' and a search icon. The main content area is titled 'University Annual Review' and 'Confirmation - Performance Criteria Approved'. A message states: 'You have successfully approved and completed this Step.' On the left, a list of steps is shown:

- ☒ Start (Due Date: 09/05/2017)
- ☐ Complete Mid-Year (Recommended) (Due Date: 03/04/2018)
- ☐ Review Self Evaluation (Due Date: 08/31/2018)
- ☐ Complete Year-End Evaluation (Due Date: 08/31/2018)

You have now completed the first step of the performance management process in PeopleSoft 9.2. The competencies, goals and/or responsibilities for use in driving feedback and evaluation throughout the year have been established. You are now ready to begin adding comments as you like to the Mid-Year Review form, and share with your employee when you deem appropriate. To learn more, go to the next section of this document.

## Performance Management User Guide

### Manager's Edition: Recording Ongoing Notes Using the Mid-Year or Six-Month Review

The next step in the Performance Management tool is the Mid-Year Review. The Mid-Year Review form is actually a “live” document that you can access and add notes to throughout the first six months of the year. The employee can do the same, and choose to share notes with you for feedback when deemed appropriate.

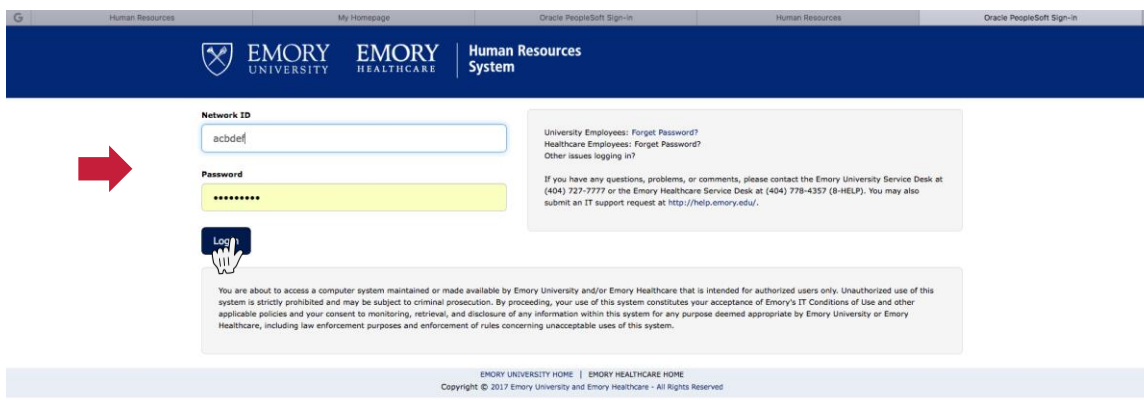
Mid-Year Reviews are optional, but highly recommended. The main advantage of the Mid-Year Review is to provide important feedback in a more timely manner than an Annual Review alone can provide. In addition, with the PeopleSoft 9.2 system, the comments from the Mid-Year Review are automatically imported into the Year-End Review form. This makes your job as a manager much easier since the form is already half complete.

For questions or concerns please contact Learning and Organizational Development at x77844.

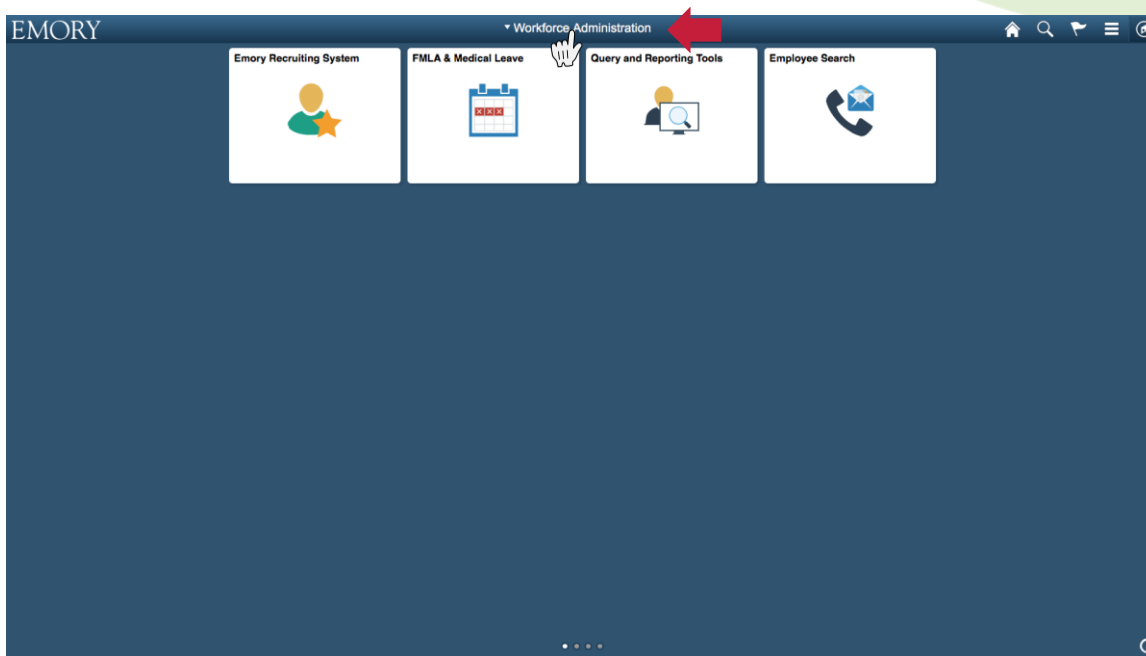
1) Begin by going to the Human Resources page and selecting "Self-Service Login."



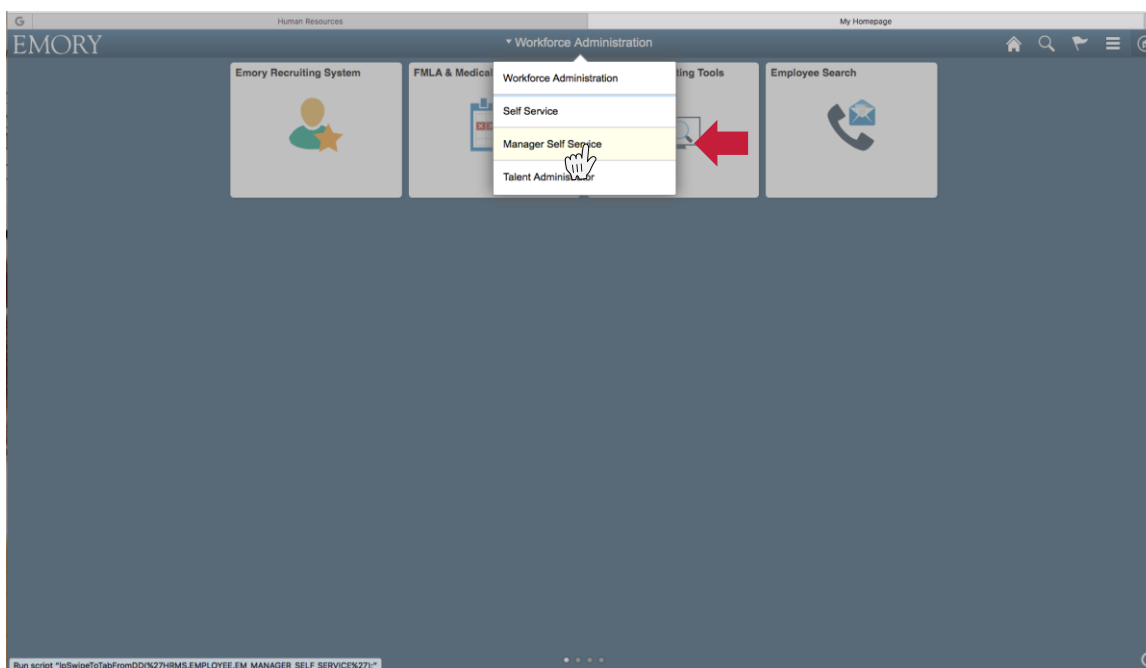
2) Type in your user name (Network ID) and password.



3) Click on the dropdown menu labeled “Workforce Administration.”



4) Select “Manager Self Service.”



The screenshot displays the Emory Manager Self Service portal. At the top, the Emory logo is on the left, and navigation icons (home, search, flags, menu, and a circular arrow) are on the right. The main content area features a grid of eight white tiles, each with a title and an icon:

- Manager Dashboard**: Icon of a bar chart and line graph.
- Employee Search**: Icon of a telephone handset and an envelope.
- Performance Management**: Icon of a person with a chart and a hand cursor pointing at it.
- Employee Profile**: Icon of two people with a large red arrow pointing left.
- Emory Recruiting System**: Icon of a person and a star.
- Exempt Leave Tracking**: Icon of a green leaf.
- FMLA & Medical Leave**: Icon of a calendar with a red 'X' on one date.
- Emory Learning Management**: Icon of a person wearing a graduation cap.

At the bottom center, there are three small dots, and at the bottom right, there is a circular refresh icon.

< Manager Self Service

MSS Performance Management

New Window | Help

Current Documents

Historical Documents

View-Only Documents

Maintain Performance Notes

Administrative Tasks

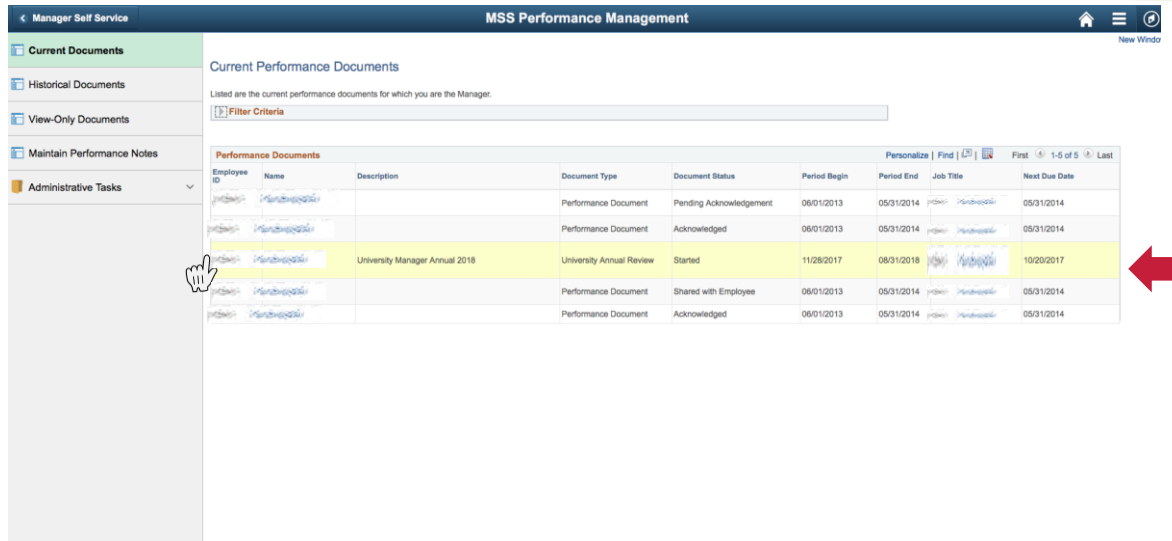
Current Performance Documents

Listed are the current performance documents for which you are the Manager.

Filter Criteria

Performance Documents						Personalize	Find	First	1 of 1	Last
Employee ID	Name	Description	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date		
		University Non Manager -2018	University Annual Review	Track Progress - Complete Mid-Year	09/01/2017	08/31/2018		03/04/2018		

7) Click on the name of the employee for whom you would like to add comments.



**Manager Self Service** **MSS Performance Management**

**Current Documents**

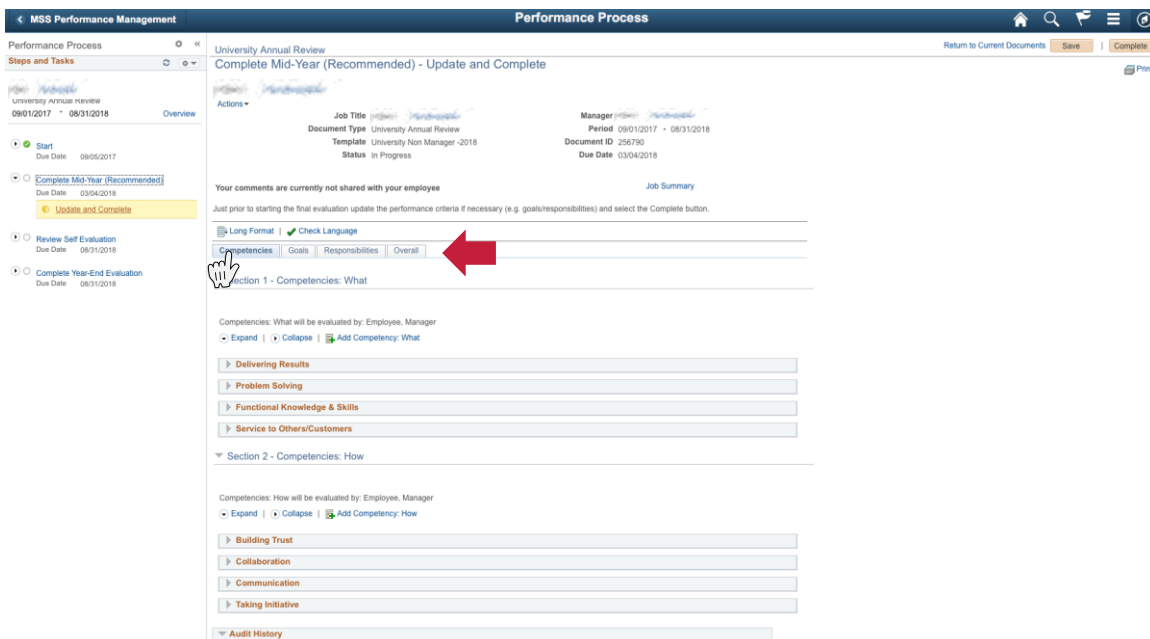
Current Performance Documents

Listed are the current performance documents for which you are the Manager.

[Filter Criteria](#)

Employee ID	Name	Description	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date
1000000001	John Doe		Performance Document	Pending Acknowledgement	06/01/2013	05/31/2014	John Doe	05/31/2014
1000000001	John Doe		Performance Document	Acknowledged	06/01/2013	05/31/2014	John Doe	05/31/2014
1000000001	John Doe	University Manager Annual 2018	University Annual Review	Started	11/28/2017	09/30/2018	John Doe	10/20/2017
1000000001	John Doe		Performance Document	Shared with Employee	06/01/2013	05/31/2014	John Doe	05/31/2014
1000000001	John Doe		Performance Document	Acknowledged	06/01/2013	05/31/2014	John Doe	05/31/2014

8) You will be taken to the performance management document where you see tabs for the Mid-Year Review, where you can add comments to competencies, goals and responsibilities. To add comments, click on the "Competencies" tab.



**MSS Performance Management** **Performance Process**

Performance Process

Steps and Tasks

University Annual Review

Complete Mid-Year (Recommended) - Update and Complete

Return to Current Documents Save Complete

Actions

Job Title: John Doe  
Document Type: University Annual Review  
Template: University Non Manager -2018  
Status: In Progress

Manager: John Doe  
Period: 09/01/2017 - 08/31/2018  
Document ID: 256790  
Due Date: 03/04/2018

Your comments are currently not shared with your employee

Job Summary

Just prior to starting the final evaluation update the performance criteria if necessary (e.g. goals/responsibilities) and select the Complete button.

Long Format Check Language

Competencies Goals Responsibilities Overall

Section 1 - Competencies: What

Competencies: What will be evaluated by: Employee, Manager

Expand Collapse Add Competency: What

Delivering Results

Problem Solving

Functional Knowledge & Skills

Service to Others/Customers

Section 2 - Competencies: How

Competencies: How will be evaluated by: Employee, Manager

Expand Collapse Add Competency: How

Building Trust

Collaboration

Communication

Taking Initiative

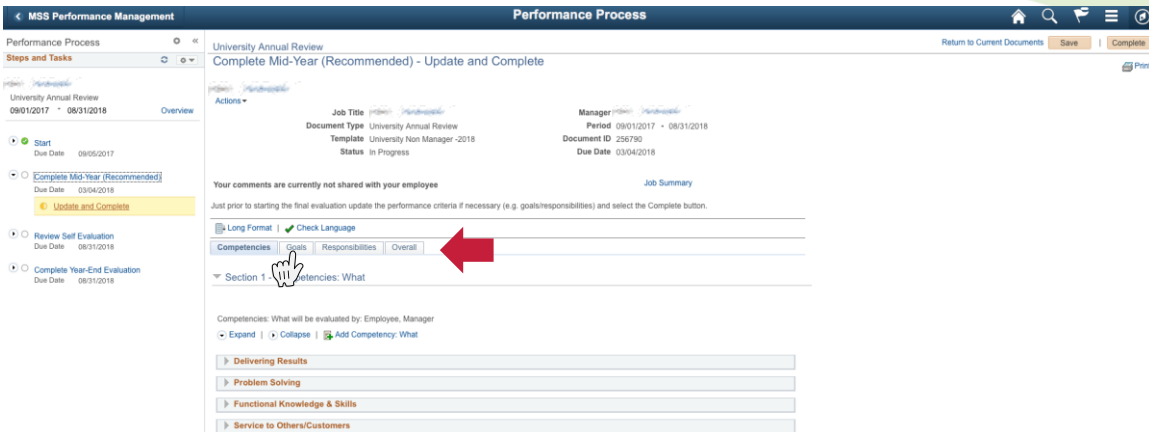
Audit History



- 9) Click on the drop down tab for the competency you would like to document, and type in your comments. If you need guidance or assistance for providing comments, please consider one of the online or classroom training programs available through Learning and Organizational Development. Additionally, go to <http://www.hr.emory.edu/eu/performancemanagement/performance.html/>.

- 10) For all sections (competencies, goals, and responsibilities) both you, and your employee will be able to make comments, and add documentation. You will not be able to see their comments until they share them with you as in the example below.

11) To add comments to the goals, click on the "Goals" tab.



**MSS Performance Management** Performance Process

University Annual Review  
Complete Mid-Year (Recommended) - Update and Complete

Return to Current Documents Save Complete

Job Title: [Name] Manager: [Name]  
Document Type: University Annual Review Period: 09/01/2017 - 08/31/2018  
Template: University Non Manager -2018 Document ID: 256790  
Status: In Progress Due Date: 03/04/2018

Your comments are currently not shared with your employee Job Summary

Just prior to starting the final evaluation update the performance criteria if necessary (e.g. goals/responsibilities) and select the Complete button.

Long Format Check Language

Competencies Goals Responsibilities Overall

Section 1 - Competencies: What

Competencies: What will be evaluated by: Employee, Manager

Expand Collapse Add Competency: What

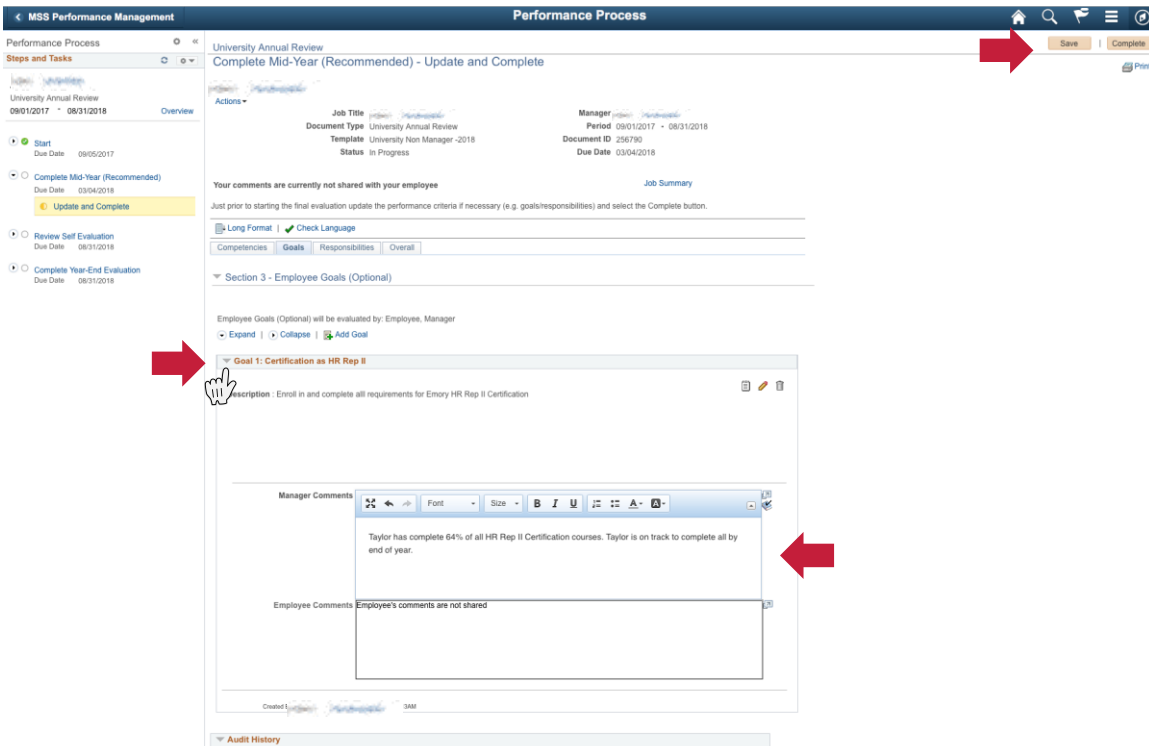
Delivering Results

Problem Solving

Functional Knowledge & Skills

Service to Others/Customers

12) Click on the drop down tab for the goal you would like to document, and type in your comments. You will not be able to see your employee's comments until they share it with you. Click save when done.



**MSS Performance Management** Performance Process

University Annual Review  
Complete Mid-Year (Recommended) - Update and Complete

Return to Current Documents Save Complete

Job Title: [Name] Manager: [Name]  
Document Type: University Annual Review Period: 09/01/2017 - 08/31/2018  
Template: University Non Manager -2018 Document ID: 256790  
Status: In Progress Due Date: 03/04/2018

Your comments are currently not shared with your employee Job Summary

Just prior to starting the final evaluation update the performance criteria if necessary (e.g. goals/responsibilities) and select the Complete button.

Long Format Check Language

Competencies Goals Responsibilities Overall

Section 3 - Employee Goals (Optional)

Employee Goals (Optional) will be evaluated by: Employee, Manager

Expand Collapse Add Goal

Goal 1: Certification as HR Rep II

Description: Enroll in and complete all requirements for Emory HR Rep II Certification

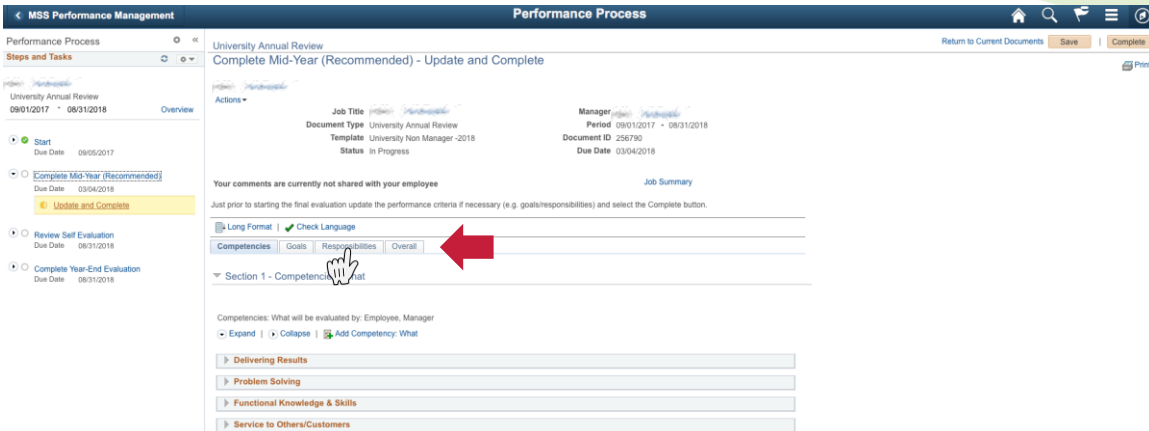
Manager Comments

Taylor has complete 64% of all HR Rep II Certification courses. Taylor is on track to complete all by end of year.

Employee Comments Employee's comments are not shared

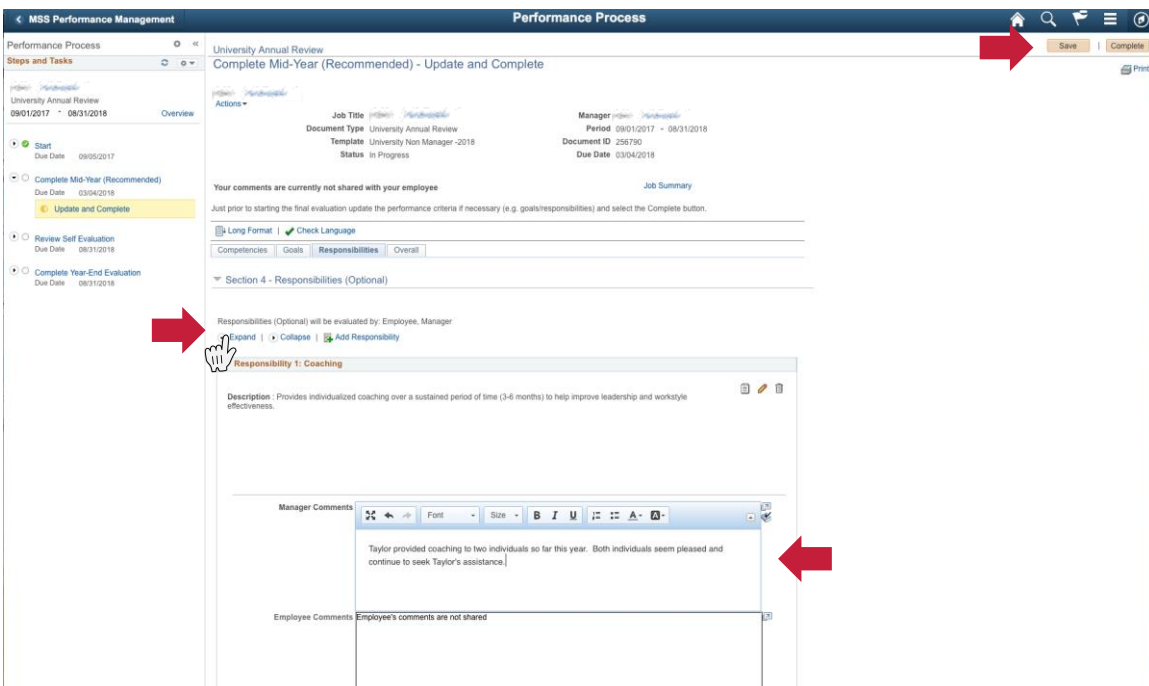
Audit History

13) To add comments to the responsibilities, click on the "Responsibilities" tab.



The screenshot shows the 'MSS Performance Management' interface. On the left, the 'Steps and Tasks' sidebar lists 'Complete Mid-Year (Recommended)' as the current step. The main content area is titled 'Complete Mid-Year (Recommended) - Update and Complete'. It displays a 'Job Title' of 'University Annual Review' and a 'Manager' of 'University Non Manager -2018'. The 'Status' is 'In Progress'. Below this, there are tabs for 'Competencies', 'Goals', 'Responsibilities', and 'Overall'. The 'Responsibilities' tab is selected, and a red arrow points to it. The 'Responsibilities' section shows a list of competencies: 'Delivering Results', 'Problem Solving', 'Functional Knowledge & Skills', and 'Service to Others/Customers'. A red arrow points to the 'Responsibilities' tab, and another red arrow points to the 'Save' button in the top right corner.

14) Click on the drop down tab for the responsibility you would like to document, and type in your comments. You will be able to see your employee's comments when they share them with you. Click save when done.



The screenshot shows the 'MSS Performance Management' interface. On the left, the 'Steps and Tasks' sidebar lists 'Complete Mid-Year (Recommended)' as the current step. The main content area is titled 'Complete Mid-Year (Recommended) - Update and Complete'. It displays a 'Job Title' of 'University Annual Review' and a 'Manager' of 'University Non Manager -2018'. The 'Status' is 'In Progress'. Below this, there are tabs for 'Competencies', 'Goals', 'Responsibilities', and 'Overall'. The 'Responsibilities' tab is selected, and a red arrow points to it. The 'Responsibilities' section shows a list of competencies: 'Delivering Results', 'Problem Solving', 'Functional Knowledge & Skills', and 'Service to Others/Customers'. A red arrow points to the 'Responsibilities' tab, and another red arrow points to the 'Save' button in the top right corner. The 'Responsibilities' section shows a list of competencies: 'Delivering Results', 'Problem Solving', 'Functional Knowledge & Skills', and 'Service to Others/Customers'. A red arrow points to the 'Responsibilities' tab, and another red arrow points to the 'Save' button in the top right corner.

You may continue to add notes to Competencies, Goals and/or Responsibilities as needed in preparation for your Mid-Year review. When you are ready to complete the Mid-Year review, please follow the steps in the next section.

## Performance Management User Guide

### Manager's Edition: Completing the Mid-Year or Six-Month Review

These next set of steps will walk you through how to complete the Mid-Year Review, which you have hopefully been updating throughout the first six months if you followed the steps in the previous section.

For questions or concerns please contact Learning and Organizational Development at x77844.

- 1) At this point in time, the Performance Review Document should have been launched from the beginning of the year, and you and your employee should have been updating the document with comments. If you have not created a Performance Review Document, or updated comments, please see the “Launching a new Performance Review Cycle” and the “Recording Ongoing Notes Using the Mid-Year or Six-Month Review” instructions. You can link to both documents below.

[Launching a new Performance Review Cycle](#)

[Recording Ongoing Notes Using the Mid-Year or Six-Month Review](#)

- 2) To complete the Mid-Year Review you should ideally see comments in the form from your employee. For this to happen, they will need to share their comments with you. The system creates a deadline for comments and sharing with your employee. After they have shared with you, you may login to the performance management system and finalize your comments, and complete a final Mid-Year or Six-Month Review.

- 3) Begin the Mid-Year Review by going to the Human Resources page and selecting “Self-Service Login.”



EMORY UNIVERSITY | Human Resources

SCHOOLS LIBRARIES RESOURCES SEARCH

BENEFITS CAREERS LEARNING & DEVELOPMENT HEALTHY EMORY WORKLIFE

Self-Service Login  
Policies  
Forms  
Pay  
Faculty Staff Assistance  
Employees  
Managers  
HR Reps

Active Works Emory Community Giving Sparkfly Fall Discounts

contact HR? have a question?

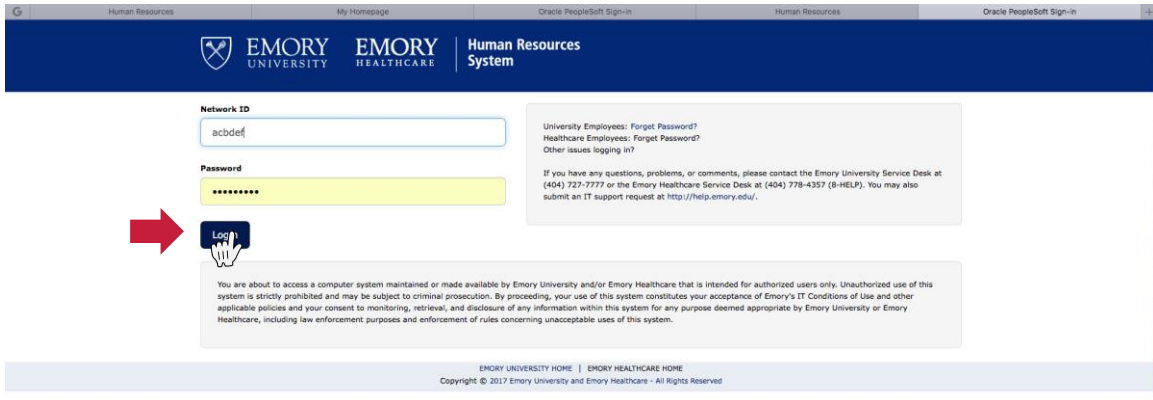
HR NEWS  
**Award of Distinction honors Emory University employees for outstanding contributions**  
Fourteen employees have been selected as this year's winners of the Emory University Award of Distinction. Since 1985, the annual awards have recognized staff members who make significant contributions to the Emory community. [Read More](#)

Also In The News  
• Great American Smokeout is November 16th  
• Caregiver Connection: Connecting Caregivers with Benefits and Resources

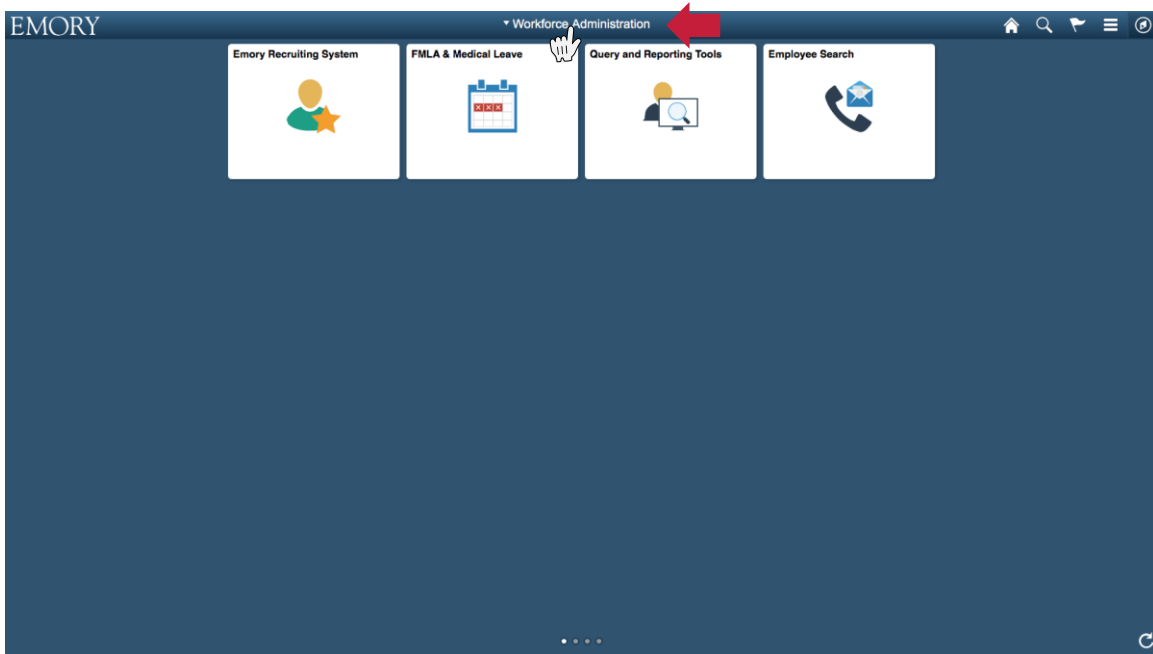
HR CALENDAR

DATE	EVENT	TIME	LOCATION
NOV 9 THU	Strategies for Influencing Others	Thu, Nov 9, 2017, 8:30am	1599 Clifton Road
NOV 9 THU	Strategies for Influencing Others	Thu, Nov 9, 2017, 8:30am	1599 Clifton Road
NOV 15 WED	Change Cycle for Staff	Wed, Nov 15, 2017, 8:30am	1599 Clifton Road

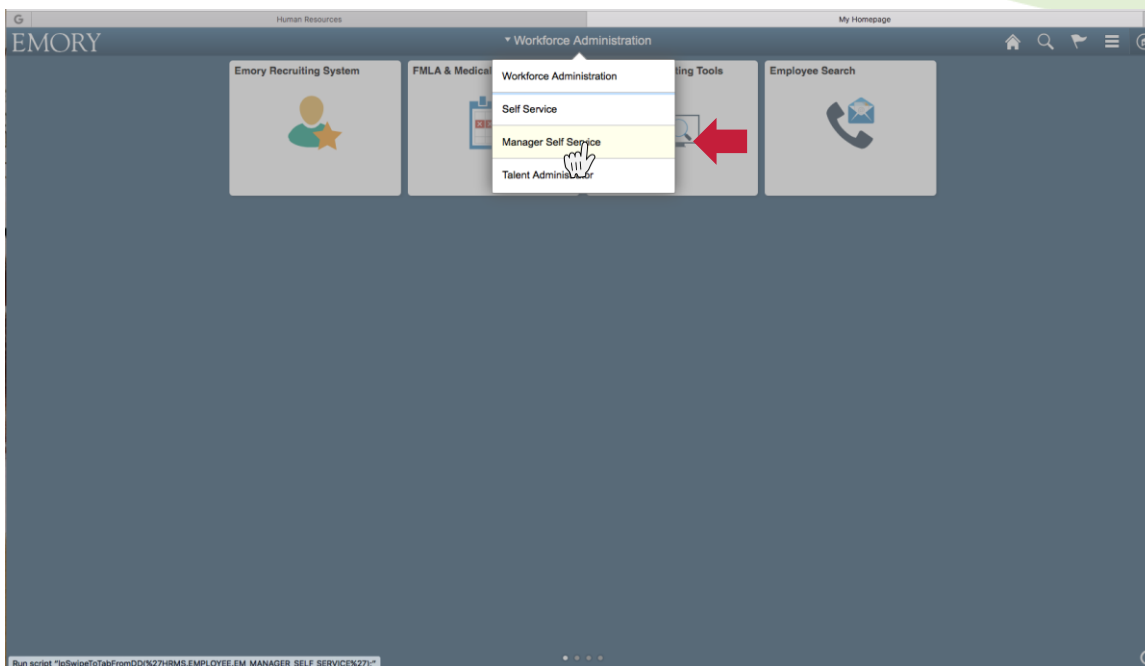
4) Type in your user name (Network ID) and password.



5) Click on the dropdown menu labeled “Workforce Administration.”



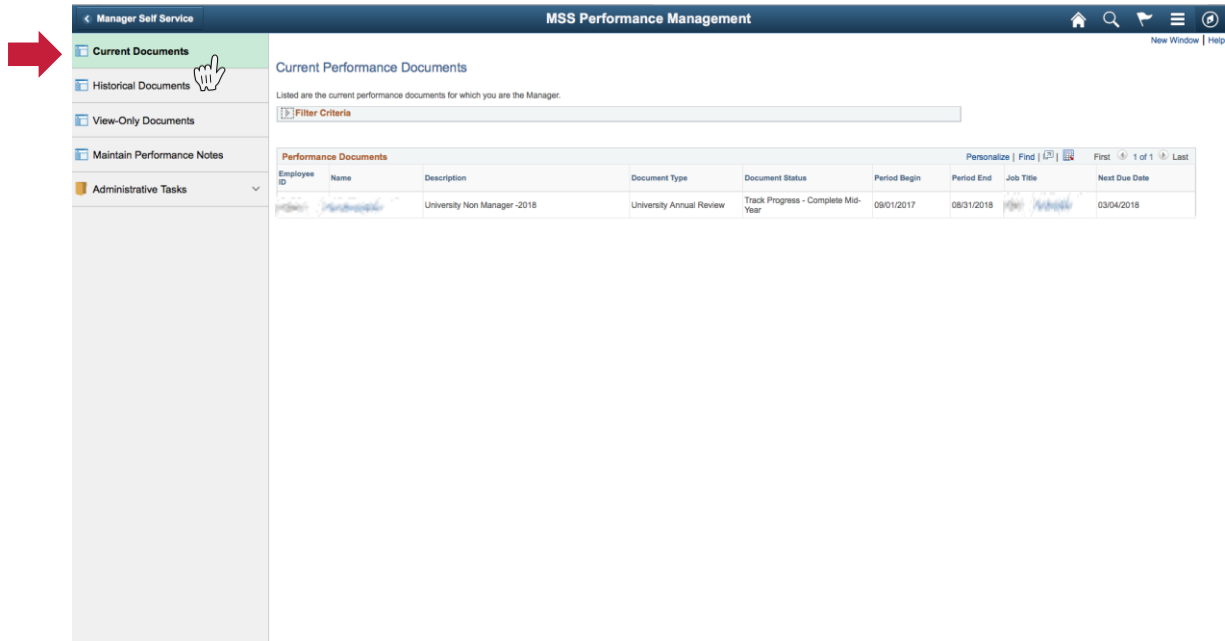
6) Select “Manager Self Service.”



7) Click on the “Performance Management” Tile.



8) From this point, you will be in the section with “Current Documents.” If you’re screen does not start here, click on “Current Documents.”



Manager Self Service MSS Performance Management

Current Documents

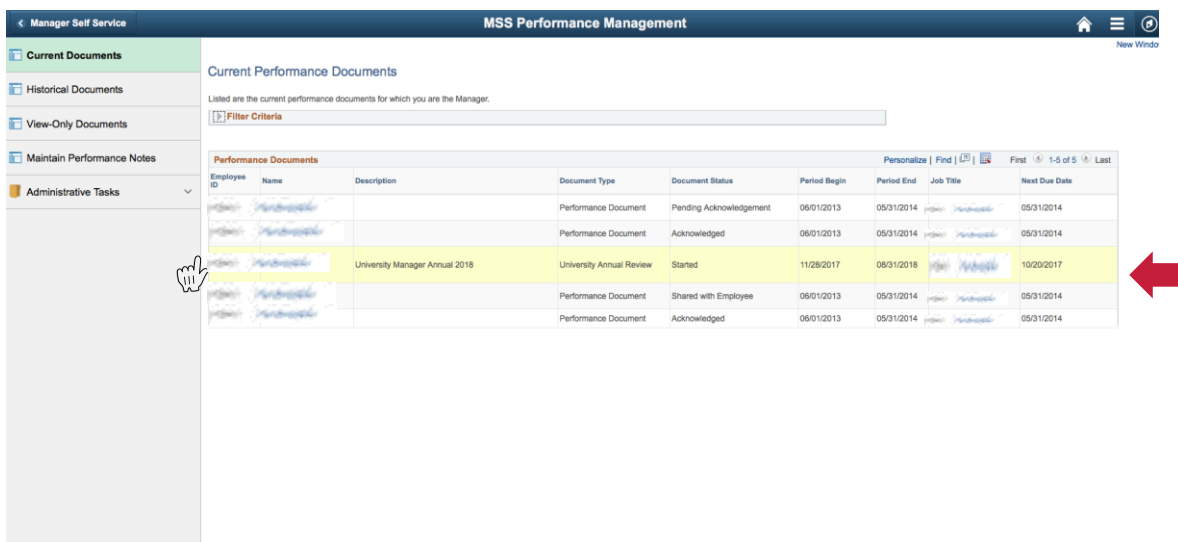
Current Performance Documents

Listed are the current performance documents for which you are the Manager.

Filter Criteria

Employee ID	Name	Description	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date
		University Non Manager -2018	University Annual Review	Track Progress - Complete Mid-Year	09/01/2017	08/31/2018		03/04/2018

9) Click on the name of the employee for whom you would like to complete a Mid-Year Review.



Manager Self Service MSS Performance Management

Current Documents

Current Performance Documents

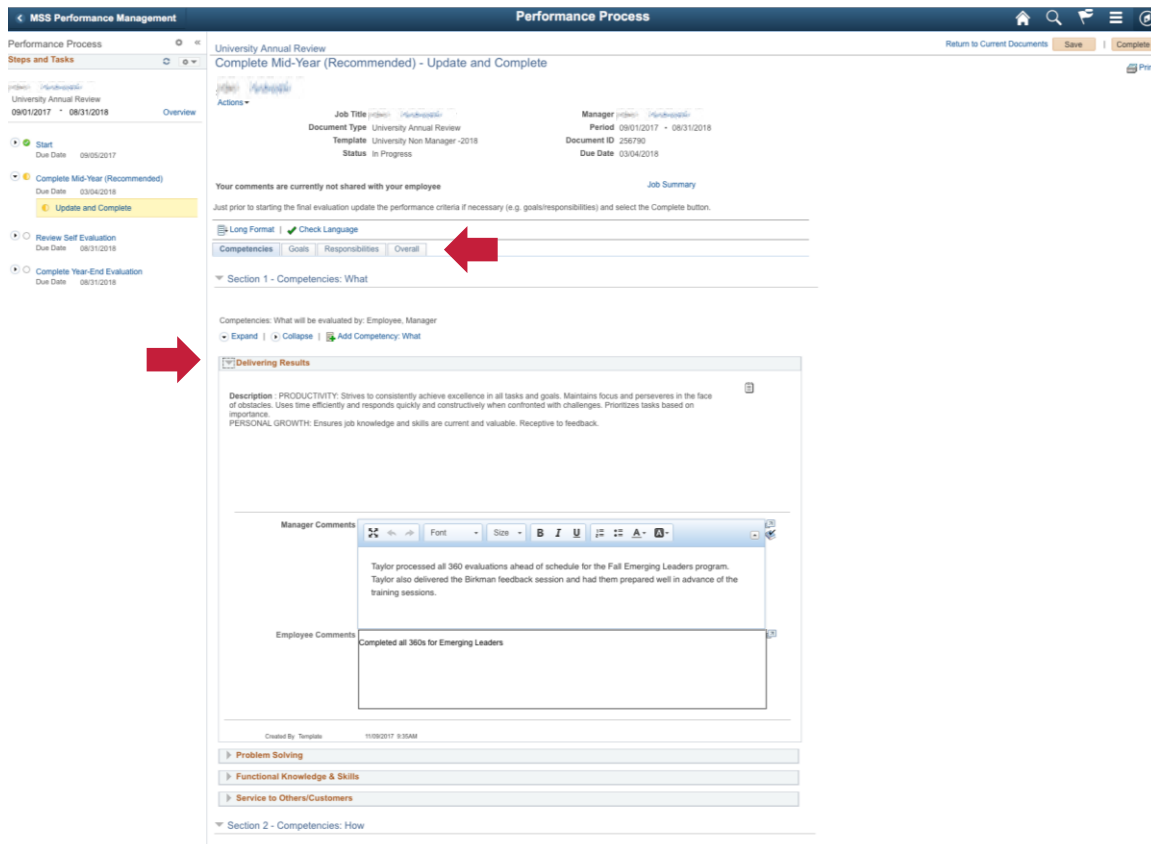
Listed are the current performance documents for which you are the Manager.

Filter Criteria

Employee ID	Name	Description	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date
			Performance Document	Pending Acknowledgement	06/01/2013	05/31/2014		05/31/2014
			Performance Document	Acknowledged	06/01/2013	05/31/2014		05/31/2014
		University Manager Annual 2018	University Annual Review	Started	11/28/2017	08/31/2018		10/20/2017
			Performance Document	Shared with Employee	06/01/2013	05/31/2014		05/31/2014
			Performance Document	Acknowledged	06/01/2013	05/31/2014		05/31/2014



- 10) From this stage, you can see the comments of your employee on the competencies, goals and responsibilities. Below you will see an example from the competencies. You can navigate these sections with the same tabs and dropdown icons as you used while updating the document.



**MSS Performance Management** Performance Process

University Annual Review

Complete Mid-Year (Recommended) - Update and Complete

Return to Current Documents Save Complete

Actions

Job Title University Non Manager -2018 Manager Period 09/01/2017 - 09/31/2018

Document Type University Annual Review Document ID 250790 Due Date 03/04/2018

Template University Non Manager -2018 Status In Progress

Your comments are currently not shared with your employee Job Summary

Just prior to starting the final evaluation update the performance criteria if necessary (e.g. goals/responsibilities) and select the Complete button.

Long Format Check Language

Competencies Goals Responsibilities Overall

Section 1 - Competencies: What

Competencies: What will be evaluated by: Employee, Manager

Expand Collapse Add Competency: What

Delivering Results

Description: PRODUCTIVITY: Strives to consistently achieve excellence in all tasks and goals. Maintains focus and perseveres in the face of obstacles. Uses time efficiently and responds quickly and constructively when confronted with challenges. Prioritizes tasks based on importance. PERSONAL GROWTH: Ensures job knowledge and skills are current and valuable. Receptive to feedback.

Manager Comments

Taylor processed all 360 evaluations ahead of schedule for the Fall Emerging Leaders program. Taylor also delivered the Birkenman feedback session and had them prepared well in advance of the training sessions.

Employee Comments

Completed all 360s for Emerging Leaders

Created By: Template 11/09/2017 9:35AM

Problem Solving

Functional Knowledge & Skills

Service to Others/Customers

Section 2 - Competencies: How

- 11) Taking your employee's comments into consideration, update and finalize your comments for the competencies, goals, and responsibilities. Don't forget to save.

Competencies: What will be evaluated by: Employee, Manager

Expand | Collapse | Add Competency: What

**Delivering Results**

**Description :** PRODUCTIVITY: Strives to consistently achieve excellence in all tasks and goals. Maintains focus and perseveres in the face of obstacles. Uses time efficiently and responds quickly and constructively when confronted with challenges. Prioritizes tasks based on importance.  
PERSONAL GROWTH: Ensures job knowledge and skills are current and valuable. Receptive to feedback.

**Manager Comments**

Taylor processed all 360 evaluations ahead of schedule for the Fall Emerging Leaders program.  
Taylor also delivered the Birkman feedback session and had them prepared well in advance of the training sessions.

**Employee Comments**

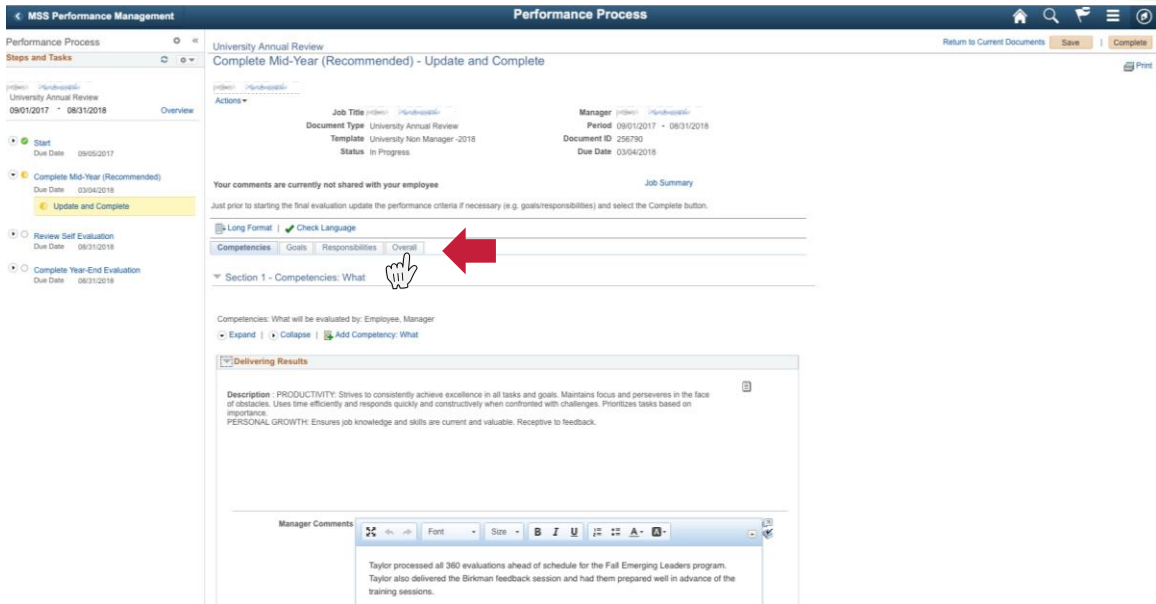
Completed all 360s for Emerging Leaders

Created By: Template 11/09/2017 9:35AM

**Problem Solving**

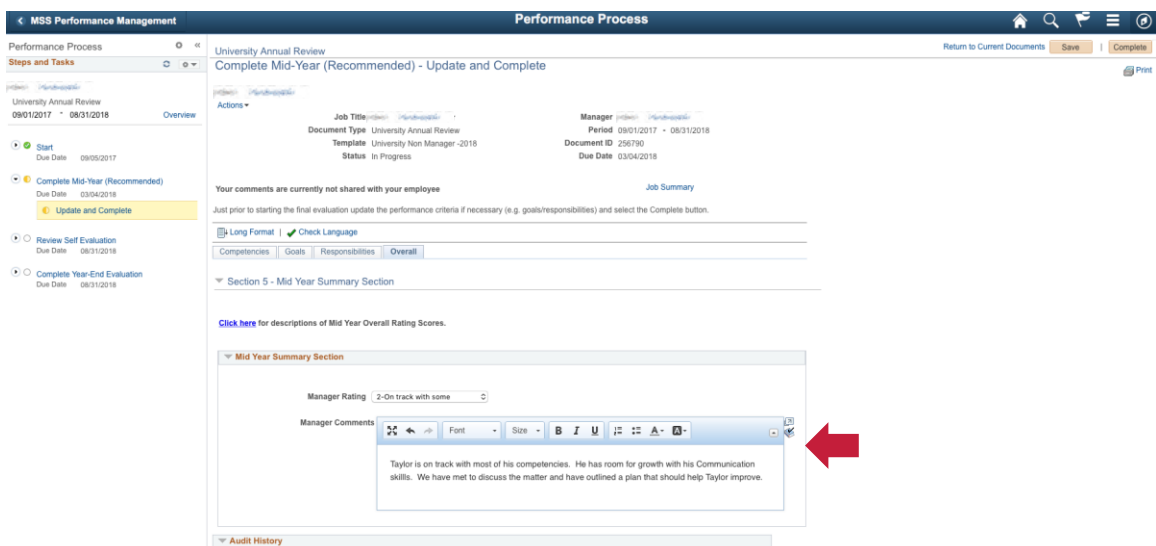
**Functional Knowledge & Skills**

- 12) When you are done updating your competencies, goals, and responsibilities, finalize the overall review by clicking on the "Overall" tab.



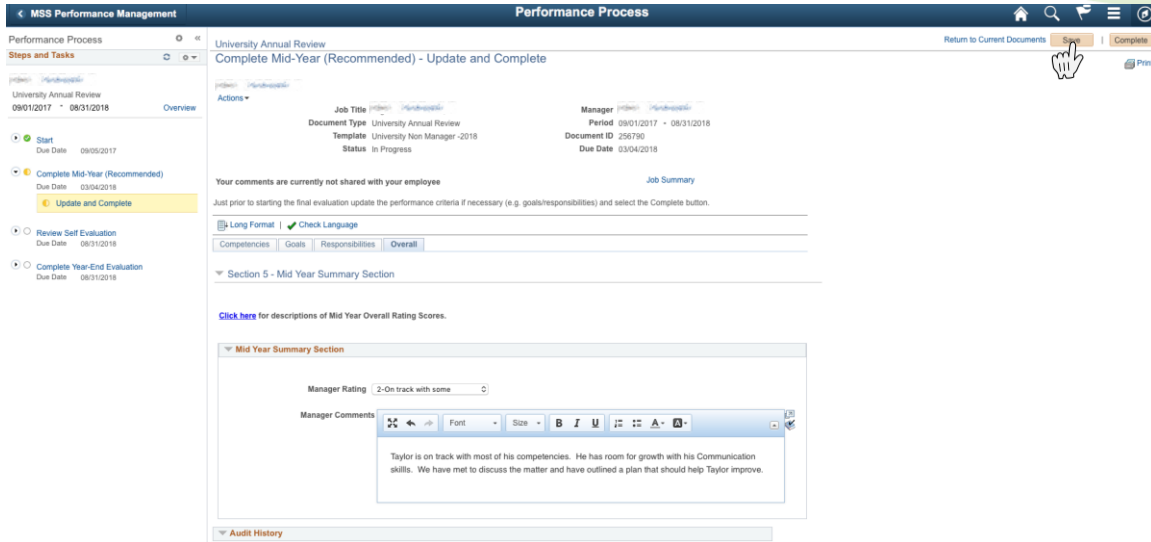
The screenshot displays the 'MSS Performance Management' interface. On the left, a 'Steps and Tasks' sidebar shows the 'Update and Complete' step for the 'Complete Mid-Year (Recommended)' review. The main content area is titled 'Performance Process' and 'University Annual Review'. It shows a 'Complete Mid-Year (Recommended) - Update and Complete' form. The 'Overall' tab is selected, and a red arrow points to it. The form includes fields for 'Job Title', 'Manager', 'Document Type', 'Template', 'Status', 'Period', 'Document ID', and 'Due Date'. Below these, there are tabs for 'Competencies', 'Goals', 'Responsibilities', and 'Overall'. The 'Overall' tab is active, showing a 'Section 1 - Competencies: What' section. A red arrow points to the 'Overall' tab. The 'Manager Comments' section is visible at the bottom, containing text about Taylor's performance.

- 13) In this tab, you will need to provide a numerical rating, and provide a written summary of the employees overall performance. The numerical rating is a scale of 1 to 3. 1 is "not on track" 2 "on track with some" and 3 "on track with all." At least 100 characters are required.



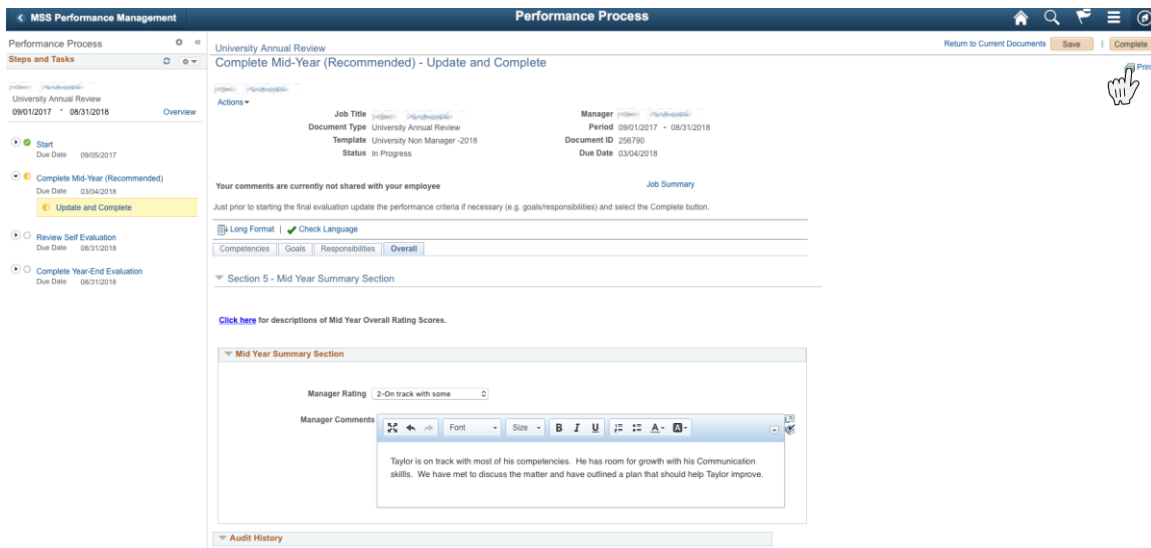
The screenshot displays the 'MSS Performance Management' interface. On the left, a 'Steps and Tasks' sidebar shows the 'Update and Complete' step for the 'Complete Mid-Year (Recommended)' review. The main content area is titled 'Performance Process' and 'University Annual Review'. It shows a 'Complete Mid-Year (Recommended) - Update and Complete' form. The 'Overall' tab is selected, and a red arrow points to it. The form includes fields for 'Job Title', 'Manager', 'Document Type', 'Template', 'Status', 'Period', 'Document ID', and 'Due Date'. Below these, there are tabs for 'Competencies', 'Goals', 'Responsibilities', and 'Overall'. The 'Overall' tab is active, showing a 'Section 5 - Mid Year Summary Section'. A red arrow points to the 'Overall' tab. The 'Manager Rating' section is visible, showing a dropdown menu with '2-On track with some' selected. The 'Manager Comments' section is visible at the bottom, containing text about Taylor's performance.

14) When you are finished, click on “Save.”



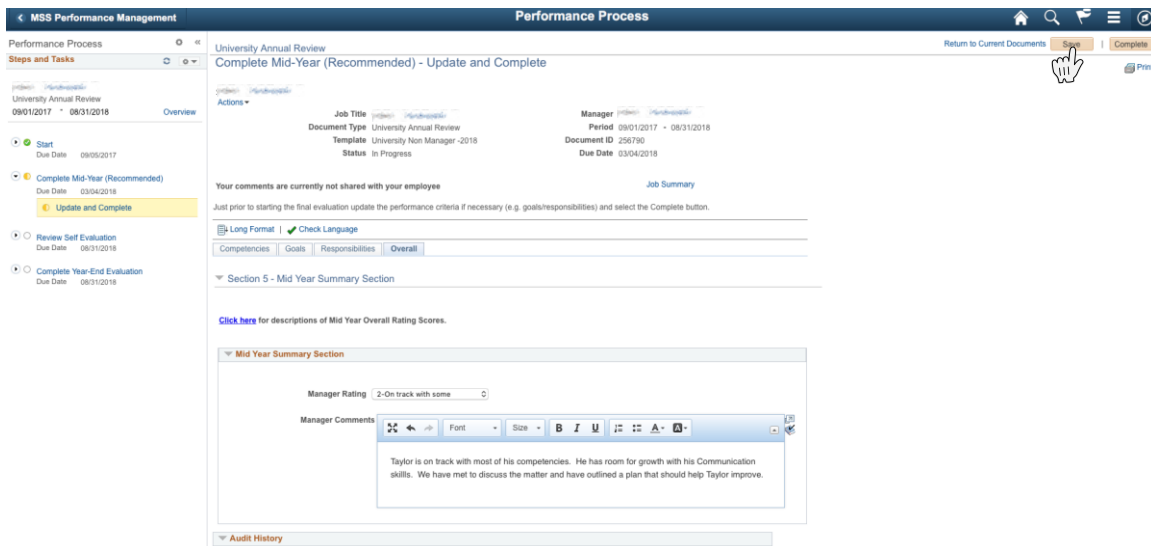
The screenshot shows the 'MSS Performance Management' interface. The main heading is 'Performance Process'. On the left, there's a 'Steps and Tasks' sidebar with a list of tasks: 'Start' (Due Date: 09/05/2017), 'Complete Mid-Year (Recommended)' (Due Date: 03/04/2018), 'Update and Complete' (highlighted), 'Review Self Evaluation' (Due Date: 08/31/2018), and 'Complete Year-End Evaluation' (Due Date: 08/31/2018). The main content area is titled 'University Annual Review' and 'Complete Mid-Year (Recommended) - Update and Complete'. It includes fields for 'Job Title', 'Document Type', 'Template', 'Status', 'Manager', 'Period', 'Document ID', and 'Due Date'. Below these, there's a section for 'Your comments are currently not shared with your employee' and a 'Job Summary' section. The 'Mid Year Summary Section' is expanded, showing a 'Manager Rating' dropdown set to '2-On track with some' and a 'Manager Comments' text area containing the text: 'Taylor is on track with most of his competencies. He has room for growth with his Communication skills. We have met to discuss the matter and have outlined a plan that should help Taylor improve.' At the bottom right, there's a 'Print' icon. A red arrow points to the 'Save' button in the top right corner.

15) At this point in time, you are ready to have your Mid-Year Review meeting with your employee. You can print a copy of your assessment for your employee by clicking on the print icon.



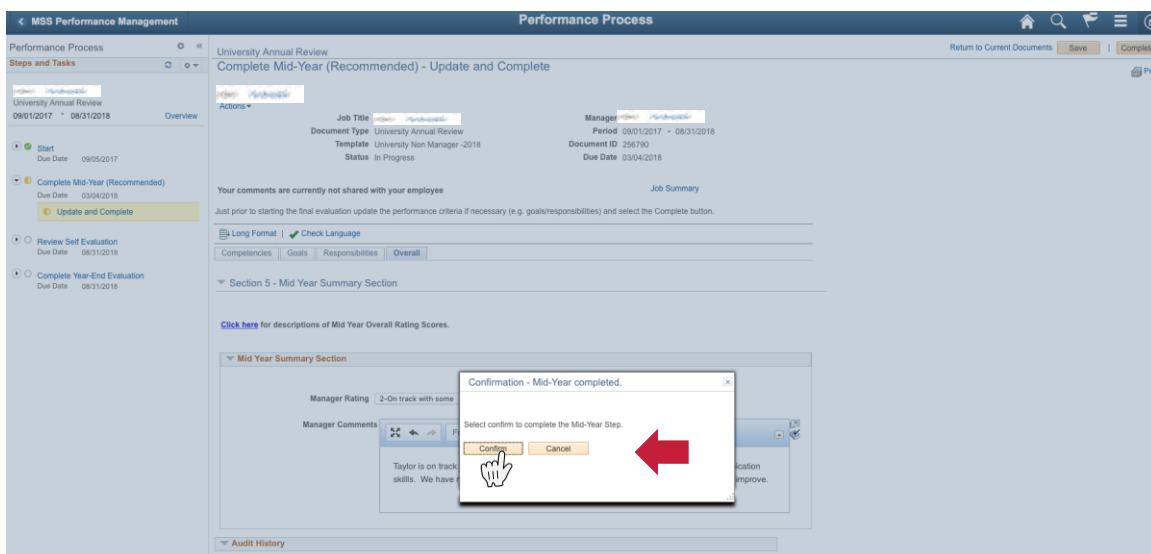
This screenshot is identical to the one above, showing the 'MSS Performance Management' interface with the 'Complete Mid-Year (Recommended) - Update and Complete' form. The 'Manager Rating' is '2-On track with some' and the 'Manager Comments' text area contains the same text. A red arrow points to the 'Print' icon in the top right corner.

16) After your meeting you will need to complete the form. If you need to update any information as a result of your conversation, make sure to update the form before you click complete. When you are ready, click on “Complete.” to finalize your Mid-Year Review.



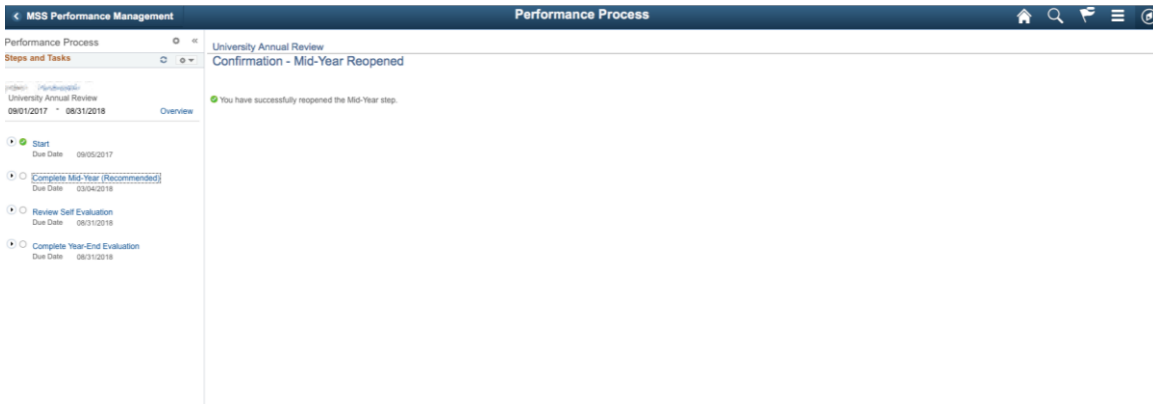
The screenshot shows the 'MSS Performance Management' interface. The main heading is 'Performance Process'. On the left, a sidebar lists 'Steps and Tasks' including 'Start', 'Complete Mid-Year (Recommended)', 'Review Self Evaluation', and 'Complete Year-End Evaluation'. The 'Complete Mid-Year (Recommended)' step is highlighted. The main content area shows the 'Complete Mid-Year (Recommended) - Update and Complete' form. At the top right, there are buttons for 'Return to Current Documents', 'Save', and 'Complete'. A red arrow points to the 'Complete' button. The form includes fields for 'Job Title', 'Document Type', 'Template', 'Status', 'Manager', 'Period', 'Document ID', and 'Due Date'. Below these, there is a section for 'Your comments are currently not shared with your employee' and a 'Job Summary' section. The 'Mid Year Summary Section' is expanded, showing a 'Manager Rating' of '2-On track with some' and a 'Manager Comments' text area. The comments text reads: 'Taylor is on track with most of his competencies. He has room for growth with his Communication skills. We have met to discuss the matter and have outlined a plan that should help Taylor improve.'

17) You will be asked to confirm. Click “Confirm.”



The screenshot shows the same 'MSS Performance Management' interface as before, but with a confirmation dialog box open. The dialog box is titled 'Confirmation - Mid-Year completed.' and contains the text 'Select confirm to complete the Mid-Year Step.' Below this text are two buttons: 'Confirm' and 'Cancel'. A red arrow points to the 'Confirm' button. The background form is slightly dimmed.

- 18) You will receive confirmation you have completed your Mid-Year Review. A notification will be sent to the employee as well. Congratulations! Acknowledgement from the employee is not required for the Mid-Year Review.



**MSS Performance Management** Performance Process

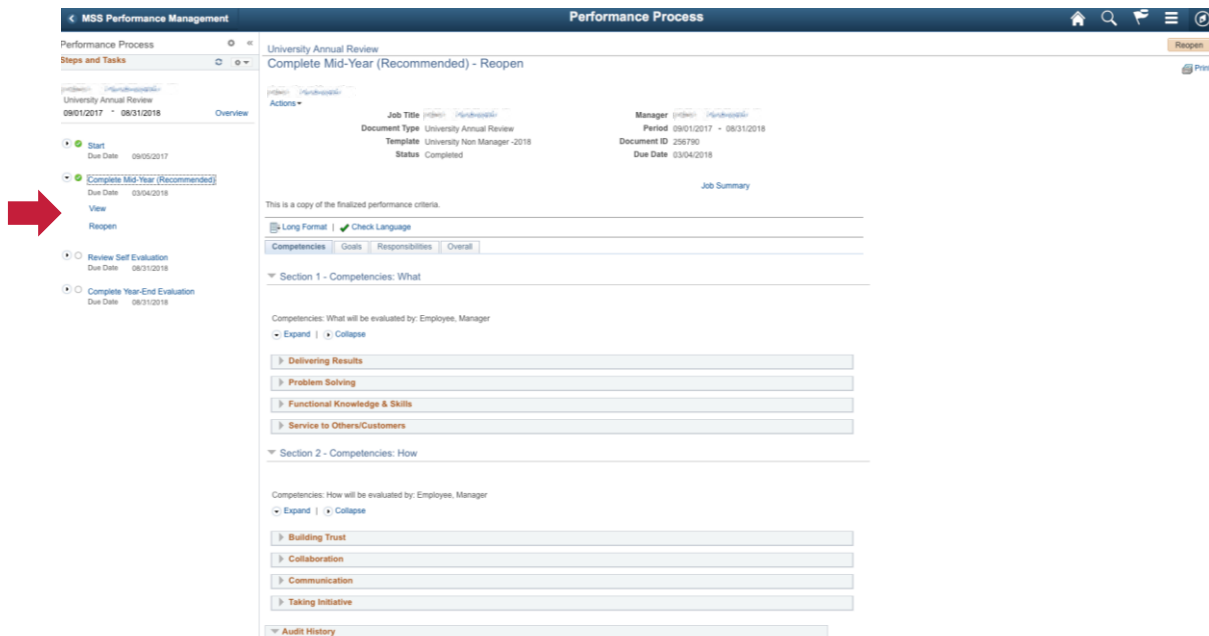
University Annual Review  
Confirmation - Mid-Year Reopened

You have successfully reopened the Mid-Year step.

**Steps and Tasks**

- Start (Due Date: 09/05/2017)
- Complete Mid-Year (Recommended) (Due Date: 03/04/2018)
- Review Self Evaluation (Due Date: 08/31/2018)
- Complete Year-End Evaluation (Due Date: 08/31/2018)

- 19) Completing the Mid-Year Review will automatically launch the Year-End Review. You may review the Mid-Year review document at anytime by going to “current documents” > selecting the name of your employee, and clicking on the dropdown of the Mid-Year Review, and selecting “View.” You may also update the Mid-Year Review at any point in the same location. Just make sure to complete it before the Year-End Review.



**MSS Performance Management** Performance Process

University Annual Review  
Complete Mid-Year (Recommended) - Reopen

Job Title: [Name] Manager: [Name]  
Document Type: University Annual Review Period: 08/01/2017 - 08/31/2018  
Template: University Non Manager -2018 Document ID: 256790  
Status: Completed Due Date: 03/04/2018

This is a copy of the finalized performance criteria.

Long Format | Check Language

Competencies | Goals | Responsibilities | Overall

Section 1 - Competencies: What

Competencies: What will be evaluated by: Employee, Manager

- Expand | Collapse
- Delivering Results
- Problem Solving
- Functional Knowledge & Skills
- Service to Others/Customers

Section 2 - Competencies: How

Competencies: How will be evaluated by: Employee, Manager

- Expand | Collapse
- Building Trust
- Collaboration
- Communication
- Taking Initiative

Audit History

## Performance Management User Guide

### Manager's Edition: Launching Upward Feedback

If you supervise a manager with two or more direct reports, then you are required to provide those individuals the opportunity to share feedback about that manager with you. Staff members have the opportunity to provide feedback about their supervisor to their supervisor's leader by answering three questions:

1. What do you see as your supervisor's greatest strengths?
2. What area(s) do you think your supervisor should develop in order to be more effective?
3. Are there other comments about your supervisor that you would like to share?

Direct reports are not required to answer the above questions; it is entirely optional but strongly encouraged. However, providing the opportunity for upward feedback is required of any supervisor with two or more direct reports. All feedback will be kept anonymous and a supervisor's leader will only receive the feedback if two or more direct reports complete the questionnaire. These instructions outline how to launch upward feedback.

If you do not supervise a manager with two or more direct reports, please skip to [page 49](#).

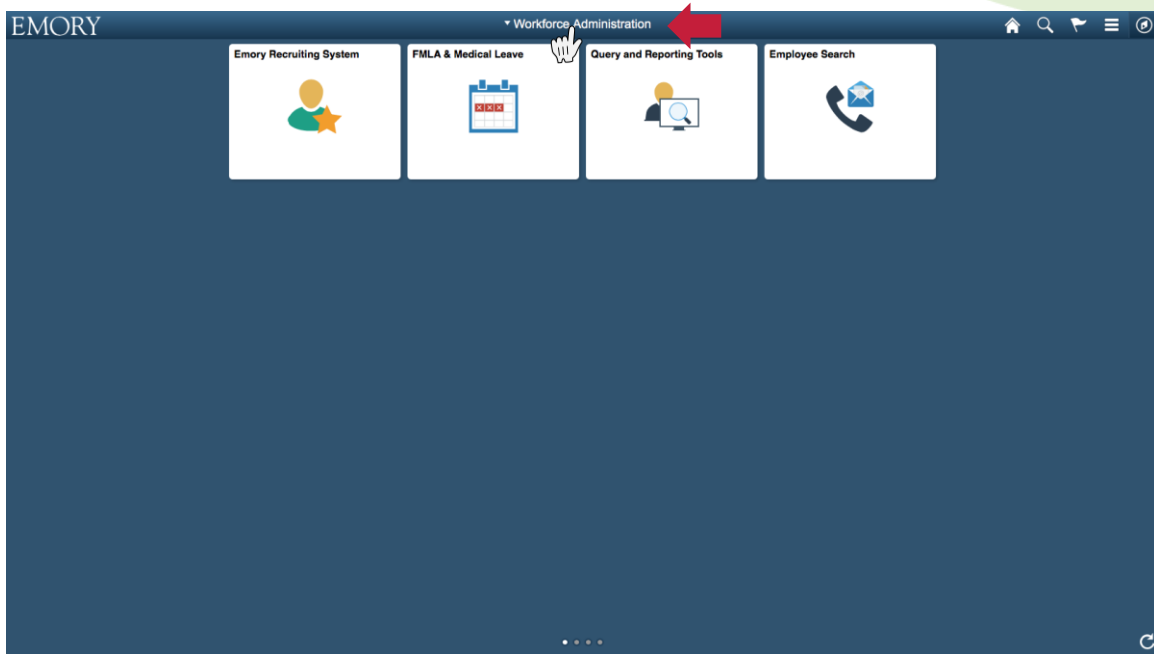
For questions or concerns please contact Learning and Organizational Development at x77844.

1) Begin by going to the Human Resources page and selecting "Self-Service Login."

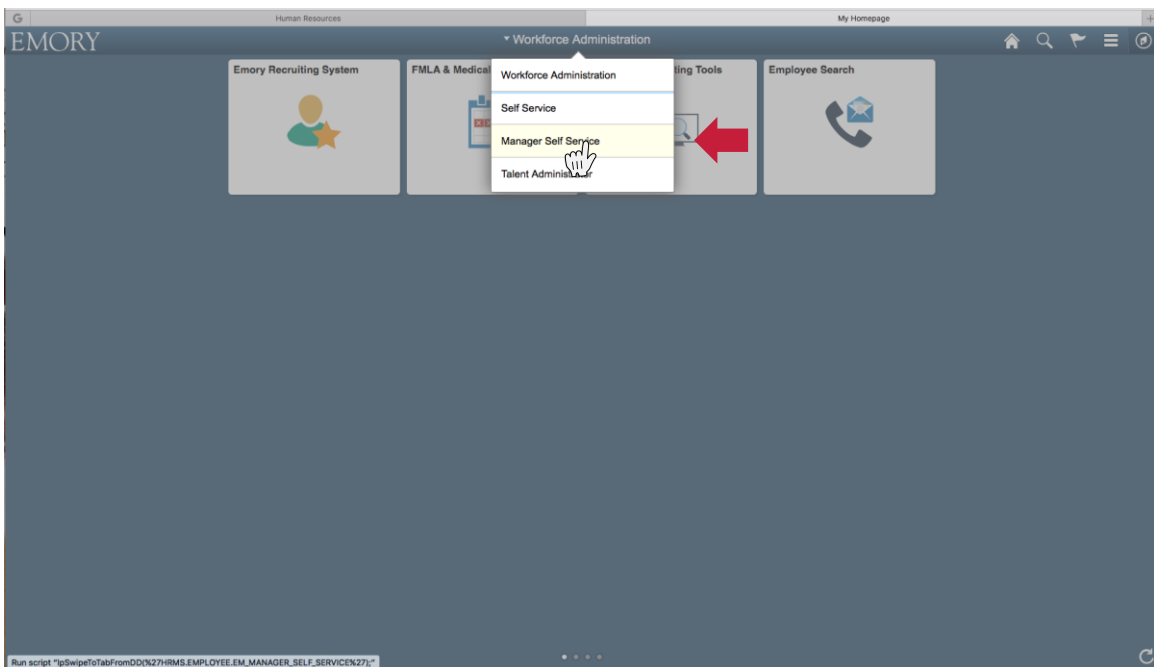
2) Type in your user name (Network ID) and password.



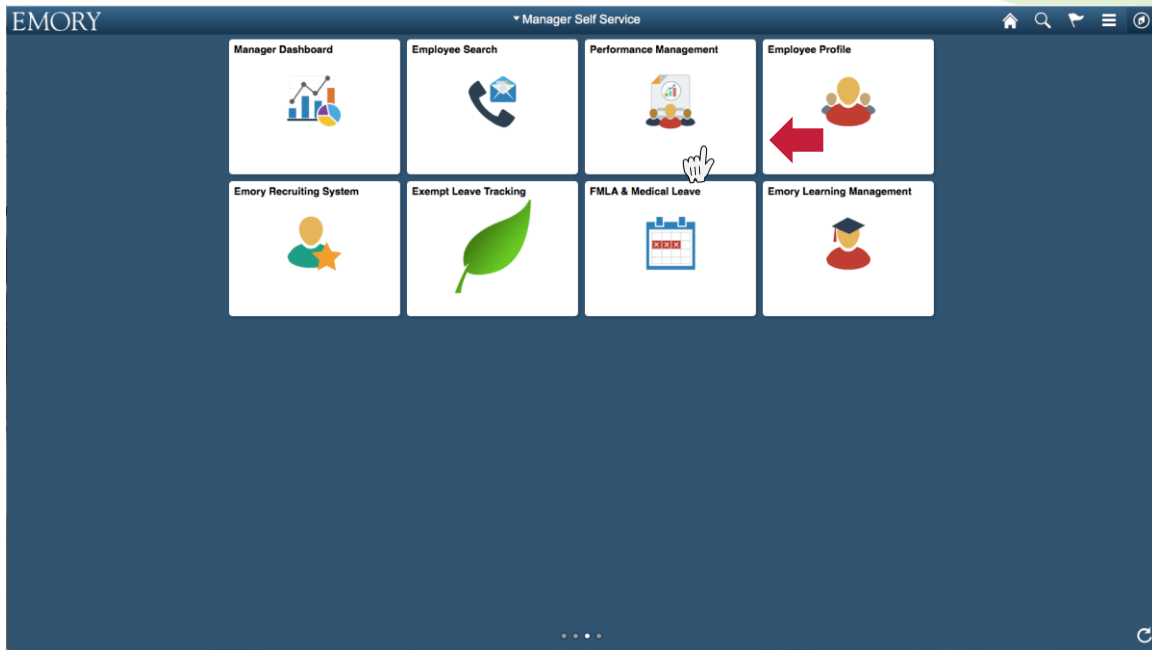
3) Click on the dropdown menu labeled “Workforce Administration.”



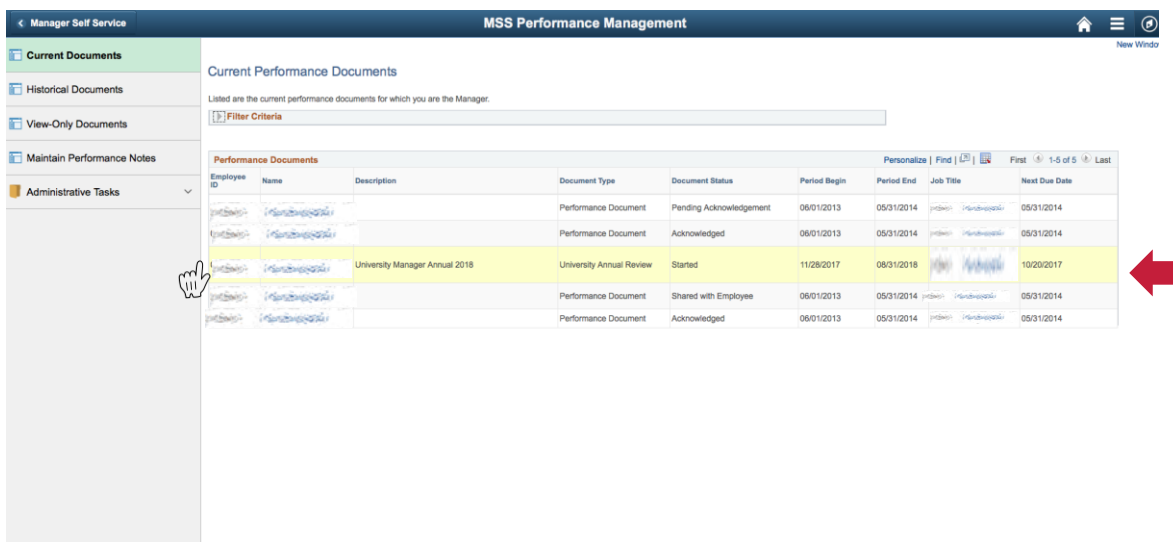
4) Select “Manager Self Service.”



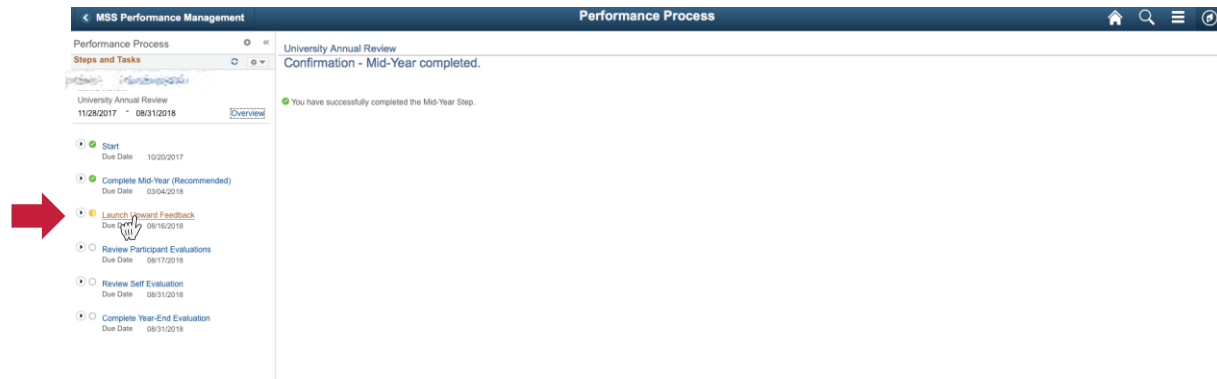
5) Click on the “Performance Management” Tile.



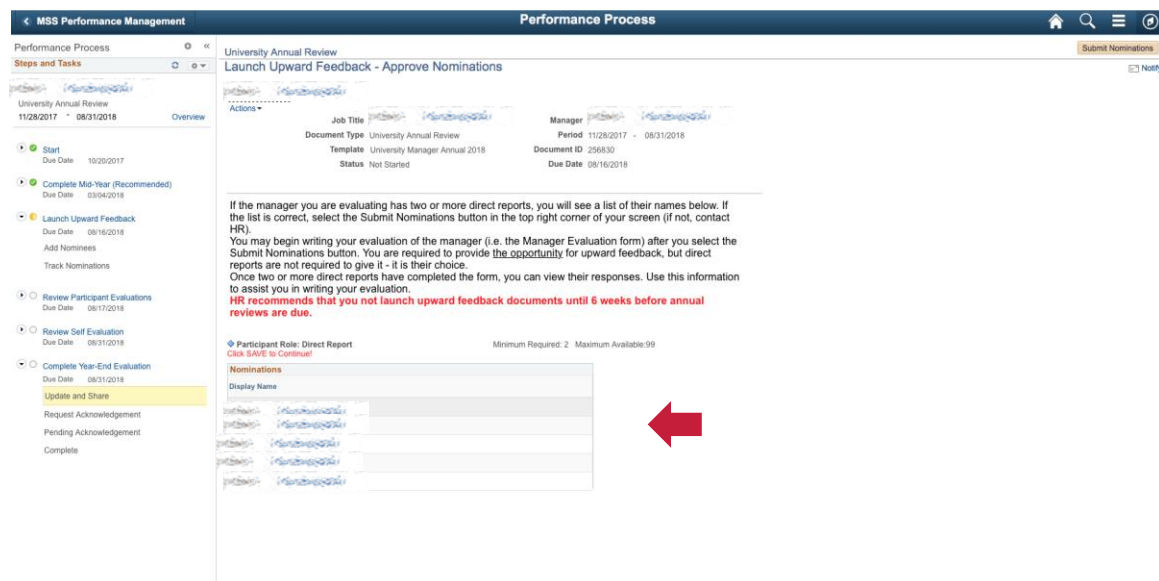
6) Click on the name of the employee for whom you would like to create an upward feedback form.



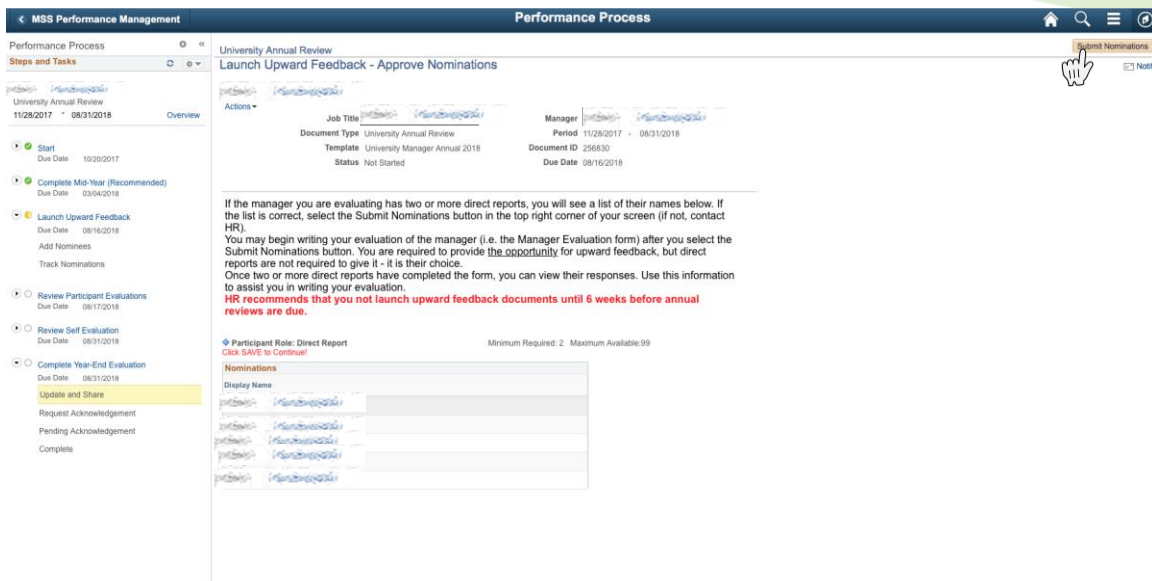
7) Click on the “Launch Upward Feedback.”



8) You will see the list of direct reports for your employee; please confirm all names are accurate. If they are not accurate contact your HR person.

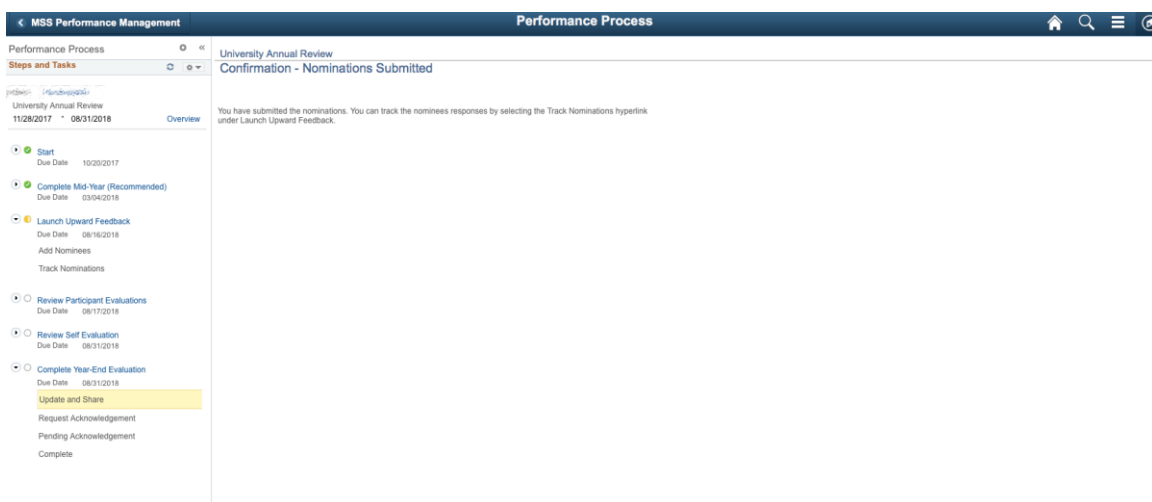


9) Click on the “Submit Nominations” button.



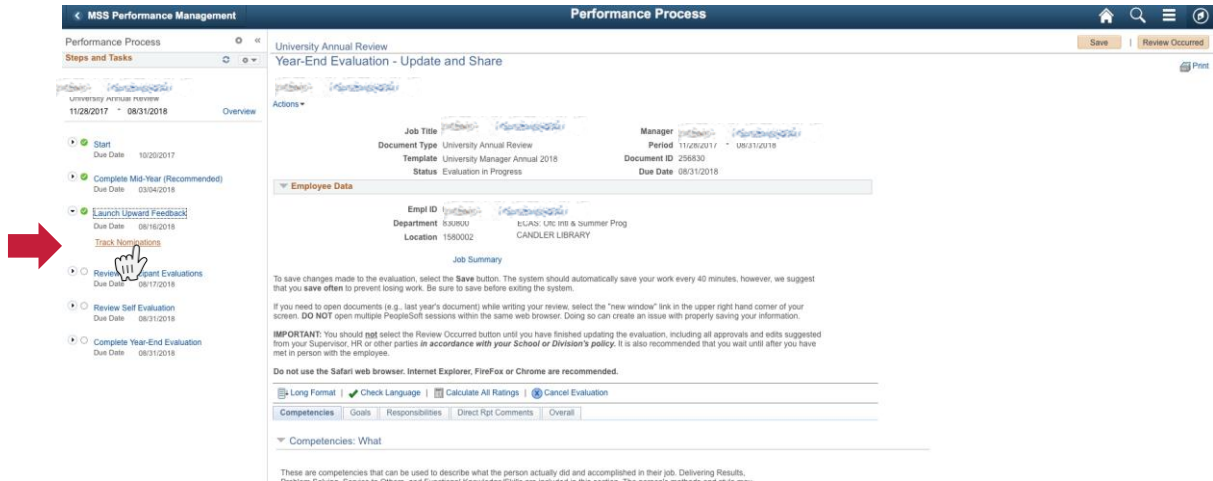
The screenshot shows the MSS Performance Management interface. The top navigation bar includes 'MSS Performance Management' and 'Performance Process'. The main content area is titled 'University Annual Review' and 'Launch Upward Feedback - Approve Nominations'. On the left, a sidebar lists 'Steps and Tasks' with 'Launch Upward Feedback' selected. The main area displays a 'Nominations' table with columns for 'Display Name' and 'Status'. A red arrow points to the 'Submit Nominations' button in the top right corner.

10) You will receive confirmation your nominations have been submitted.



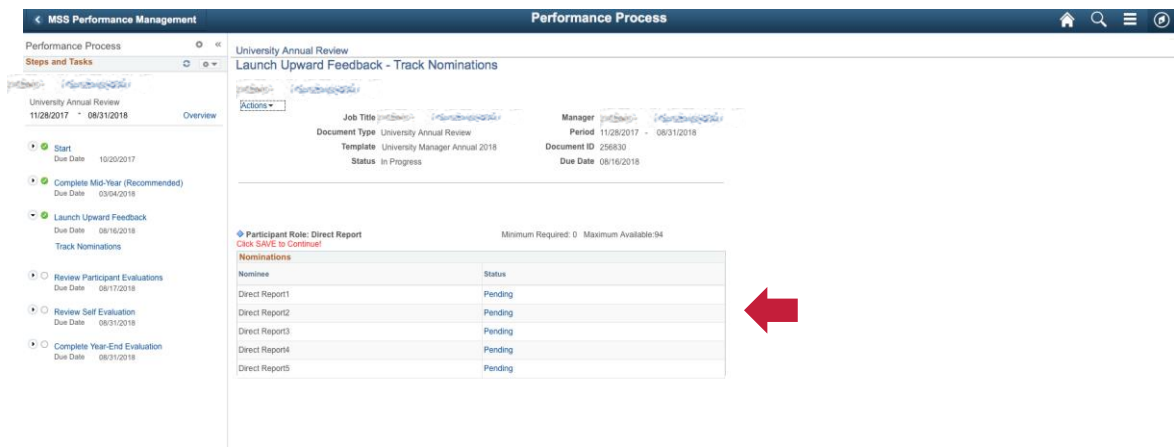
The screenshot shows the MSS Performance Management interface after submitting nominations. The top navigation bar is the same. The main content area is titled 'University Annual Review' and 'Confirmation - Nominations Submitted'. The sidebar on the left is identical to the previous screenshot. The main area displays a confirmation message: 'You have submitted the nominations. You can track the nominees responses by selecting the Track Nominations hyperlink under Launch Upward Feedback.'

11) To view if people have submitted upward feedback, you may click on the “Track Nominations” link below the “Launch Upward Feedback” section of the document.



The screenshot shows the 'MSS Performance Management' interface. On the left, under 'Steps and Tasks', the 'Launch Upward Feedback' step is highlighted with a green checkmark and a due date of 08/16/2018. Below it, the 'Track Nominations' link is visible. A red arrow points to this link. The main content area shows the 'Year-End Evaluation - Update and Share' section, which includes fields for Job Title, Document Type, Template, Status, Manager, Period, Document ID, and Due Date. Below these fields, there is a section for 'Employee Data' and a 'Job Summary' section. The 'Job Summary' section contains instructions for saving changes and a warning about not using the Safari web browser.

12) You will see how many people have returned feedback. This information will be randomized and anonymous.



The screenshot shows the 'MSS Performance Management' interface. On the left, under 'Steps and Tasks', the 'Launch Upward Feedback' step is highlighted with a green checkmark and a due date of 08/16/2018. Below it, the 'Track Nominations' link is visible. A red arrow points to this link. The main content area shows the 'Launch Upward Feedback - Track Nominations' section, which includes fields for Job Title, Document Type, Template, Status, Manager, Period, Document ID, and Due Date. Below these fields, there is a section for 'Participant Role: Direct Report' and a table for 'Nominations'. The 'Nominations' table has columns for 'Nominee' and 'Status'. The table lists five direct reports, all with a status of 'Pending'. A red arrow points to the 'Nominations' table.

## Performance Management User Guide

### Manager's Edition: Completing the Year-End Review

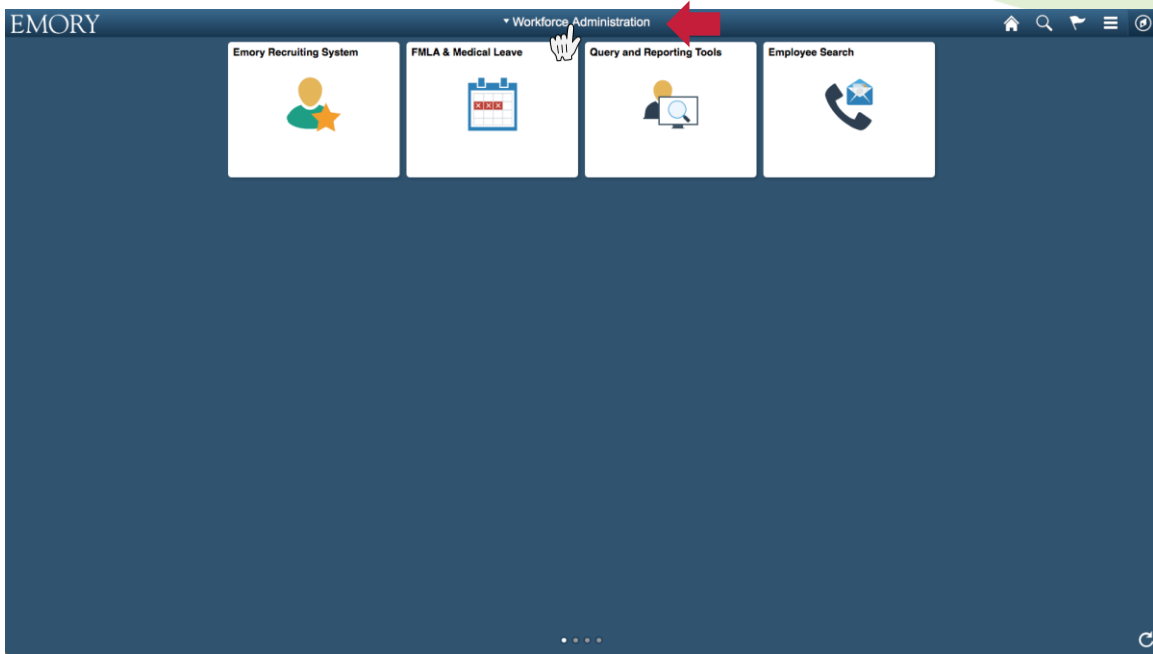
To complete the Year-End Review, you should review your notes on your employee, the Mid-Year Review, the employee's self-evaluation, and if the employee has direct reports, you should consider the upward feedback provided. This section of the instructions will show you how to review the self evaluation, and upward feedback. It will finish by showing you the steps to completing the Year-End Review.

For questions or concerns please contact Learning and Organizational Development at x77844.

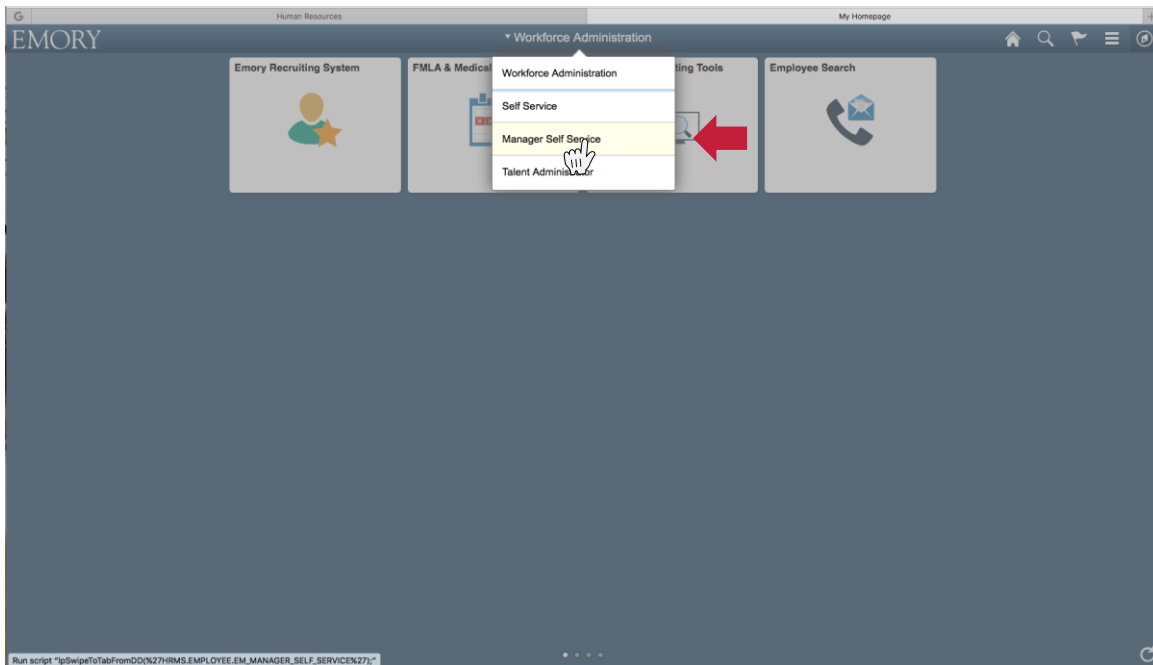
1) Begin by going to the Human Resources page and selecting "Self-Service Login."

2) Type in your user name (Network ID) and password.

3) Click on the dropdown menu labeled “Workforce Administration.”

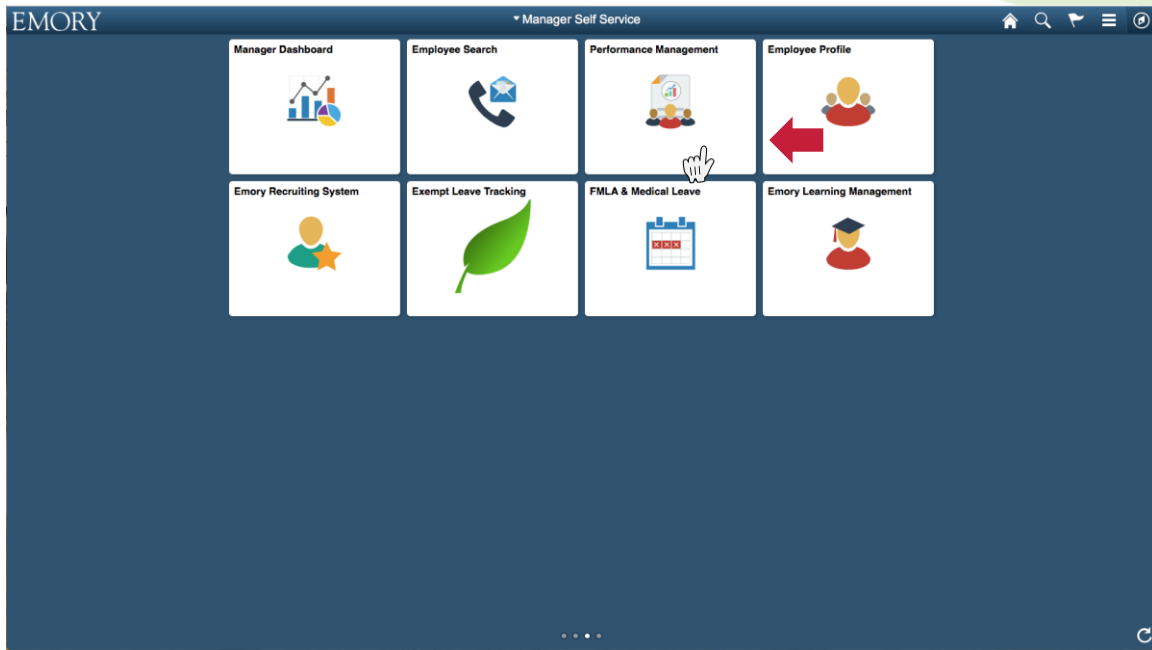


4) Select “Manager Self Service.”

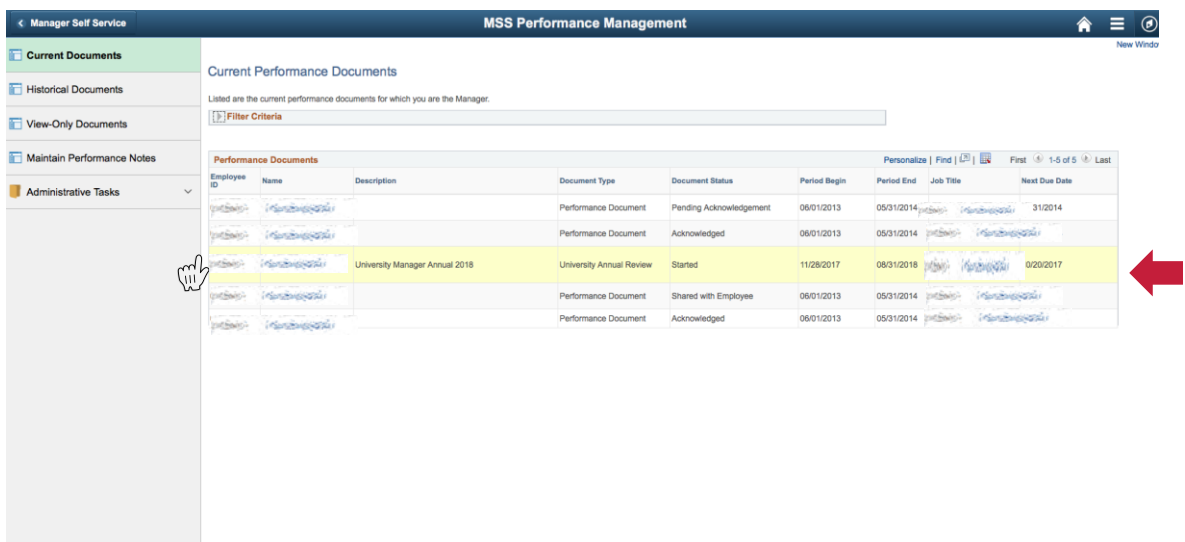




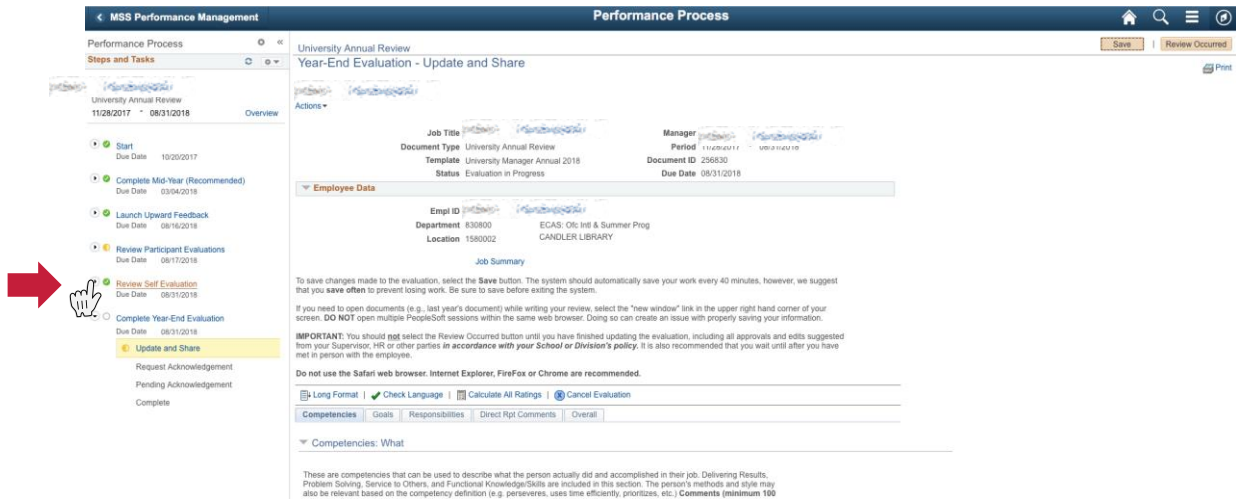
5) Click on the “Performance Management” Tile.



6) Click on the name of the employee for whom you would like to complete the Year-End Review.



7) Click on the “Review Self Evaluation” drop down icon.



**MSS Performance Management** **Performance Process**

Performance Process **University Annual Review** **Year-End Evaluation - Update and Share** **Save** **Review Occurred** **Print**

**Steps and Tasks**

- Start Due Date: 10/20/2017
- Complete Mid-Year (Recommended) Due Date: 03/04/2018
- Launch Upward Feedback Due Date: 08/16/2018
- Review Participant Evaluations Due Date: 08/17/2018
- Review Self Evaluation** Due Date: 08/31/2018
- Complete Year-End Evaluation Due Date: 08/31/2018
- Update and Share
- Request Acknowledgement
- Pending Acknowledgement
- Complete

**Job Title** **Manager**

**Document Type** University Annual Review **Period** 11/28/2017 - 08/31/2018

**Template** University Manager Annual 2018 **Document ID** 256830

**Status** Evaluation in Progress **Due Date** 08/31/2018

**Employee Data**

**Empl ID** **Department** 830800 ECAS: Ofc Int & Summer Prog

**Location** 1580002 CANDLER LIBRARY

**Job Summary**

To save changes made to the evaluation, select the **Save** button. The system should automatically save your work every 40 minutes, however, we suggest that you **save often** to prevent losing work. Be sure to save before exiting the system.

If you need to open documents (e.g., last year's document) while writing your review, select the "new window" link in the upper right hand corner of your screen. **DO NOT** open multiple PeopleSoft sessions within the same web browser. Doing so can create an issue with properly saving your information.

**IMPORTANT:** You should **not** select the Review Occurred button until you have finished updating the evaluation, including all approvals and edits suggested from your Supervisor, HR or other parties **in accordance with your School or Division's policy**. It is also recommended that you wait until after you have met in person with the employee.

**Do not use the Safari web browser. Internet Explorer, Firefox or Chrome are recommended.**

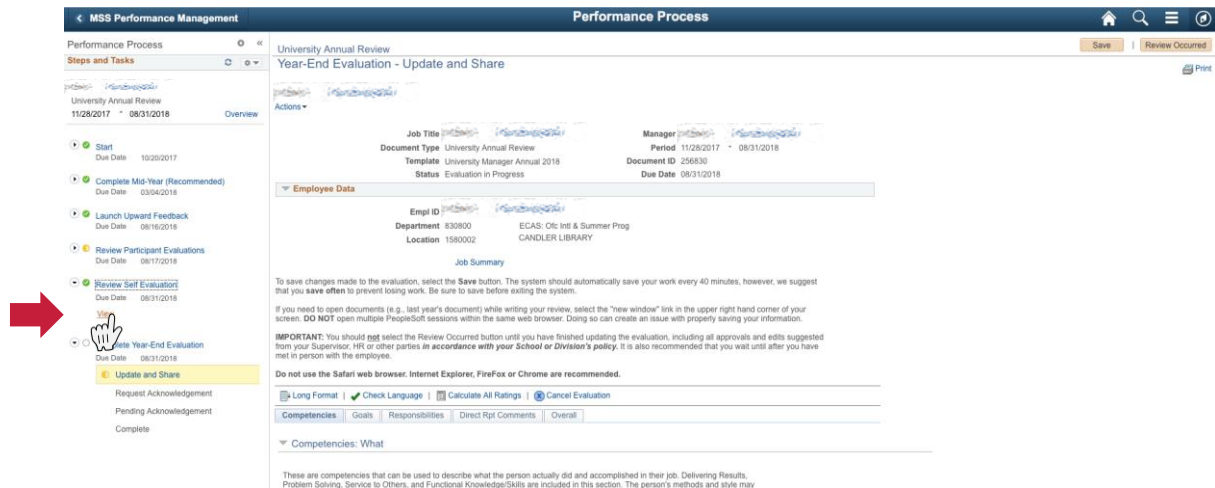
**Long Format** | **Check Language** | **Calculate All Ratings** | **Cancel Evaluation**

**Competencies** **Goals** **Responsibilities** **Direct Rpt Comments** **Overall**

**Competencies: What**

These are competencies that can be used to describe what the person actually did and accomplished in their job. Delivering Results, Problem Solving, Service to Others, and Functional Knowledge/Skills are included in this section. The person's methods and style may also be relevant based on the competency definition (e.g. perseveres, uses time efficiently, prioritizes, etc.) **Comments (minimum 100)**

8) Click on “View.”



**MSS Performance Management** **Performance Process**

Performance Process **University Annual Review** **Year-End Evaluation - Update and Share** **Save** **Review Occurred** **Print**

**Steps and Tasks**

- Start Due Date: 10/20/2017
- Complete Mid-Year (Recommended) Due Date: 03/04/2018
- Launch Upward Feedback Due Date: 08/16/2018
- Review Participant Evaluations Due Date: 08/17/2018
- Review Self Evaluation Due Date: 08/31/2018
- Complete Year-End Evaluation Due Date: 08/31/2018
- Update and Share
- Request Acknowledgement
- Pending Acknowledgement
- Complete

**Job Title** **Manager**

**Document Type** University Annual Review **Period** 11/28/2017 - 08/31/2018

**Template** University Manager Annual 2018 **Document ID** 256830

**Status** Evaluation in Progress **Due Date** 08/31/2018

**Employee Data**

**Empl ID** **Department** 830800 ECAS: Ofc Int & Summer Prog

**Location** 1580002 CANDLER LIBRARY

**Job Summary**

To save changes made to the evaluation, select the **Save** button. The system should automatically save your work every 40 minutes, however, we suggest that you **save often** to prevent losing work. Be sure to save before exiting the system.

If you need to open documents (e.g., last year's document) while writing your review, select the "new window" link in the upper right hand corner of your screen. **DO NOT** open multiple PeopleSoft sessions within the same web browser. Doing so can create an issue with properly saving your information.

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**Do not use the Safari web browser. Internet Explorer, Firefox or Chrome are recommended.**

**Long Format** | **Check Language** | **Calculate All Ratings** | **Cancel Evaluation**

**Competencies** **Goals** **Responsibilities** **Direct Rpt Comments** **Overall**

**Competencies: What**

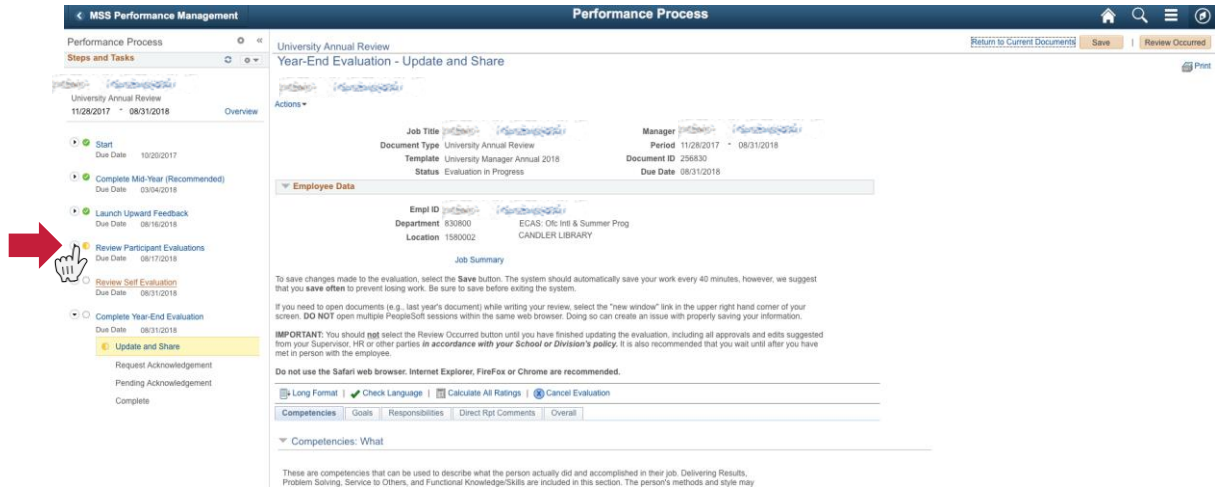
These are competencies that can be used to describe what the person actually did and accomplished in their job. Delivering Results, Problem Solving, Service to Others, and Functional Knowledge/Skills are included in this section. The person's methods and style may

- 9) You will be able to see your employees self evaluation. If you cannot see the information, your employee has not shared the information with you. You can navigate the feedback by selecting the competencies, goals of responsibilities tabs, and by clicking on the drop down icons under each tab.

The screenshot displays the 'Self-Evaluation - Completed' interface. At the top, there's a header bar with the title 'Self-Evaluation - Completed' and navigation icons. Below this, the 'University Annual Review' section is visible, showing 'Self-Evaluation - Completed' as the current view. A 'Print' button is located on the right. The main content area includes a 'Job Title' field, a 'Manager' field, and a 'Period' field. Below these, there's a 'Document ID' and a 'Due Date'. A 'Status' field indicates 'Completed'. A 'Job Summary' section is also present. The 'The document status is Completed.' message is shown. The 'Long Format' and 'Reopen' buttons are visible. The 'Competencies' tab is selected, and the 'Expand' button is clicked. The 'Competencies: What' section is expanded, showing a description of 'PRODUCTIVITY' and 'PERSONAL GROWTH'. Below this, there's a list of 'Meets Expectations Behaviors Examples'. The 'Employee Comments' field contains the text 'I think I am great.' The 'Problem Solving' sub-tab is selected, and the 'Expand' button is clicked. The 'Competencies: How' section is expanded, showing a list of sub-tabs: 'Building Trust', 'Collaboration', and 'Communication'. A script is visible at the bottom: 'Run script "submitAction\_win6(document.win6,EP\_BTN\_LINK\_WRK\_EP\_GROUPBOX\$0);"'.

10) We will now begin how to review Upward Feedback. If your employee does not have any direct reports, please skip to step 15.

11) Click on the dropdown icon for the “Review Performance Feedback” section.



**MSS Performance Management** **Performance Process**

Performance Process **University Annual Review** [Return to Current Document](#) [Save](#) [Review Occurred](#)

**Steps and Tasks** **Year-End Evaluation - Update and Share**

University Annual Review 11/28/2017 - 08/31/2018 Overview

- Start Due Date: 10/20/2017
- Complete Mid-Year (Recommended) Due Date: 03/04/2018
- Launch Upward Feedback Due Date: 08/16/2018
- Review Participant Evaluations** Due Date: 08/17/2018
- Review Self Evaluation Due Date: 08/31/2018
- Complete Year-End Evaluation Due Date: 08/31/2018
- Update and Share**
  - Request Acknowledgement
  - Pending Acknowledgement
  - Complete

**Employee Data**

Job Title: University Manager Annual Review  
Document Type: University Annual Review  
Template: University Manager Annual 2018  
Status: Evaluation in Progress

Manager: [User]  
Period: 11/28/2017 - 08/31/2018  
Document ID: 256830  
Due Date: 08/31/2018

**Job Summary**

Empl ID: [User]  
Department: 83000 ECAS' Ols H&L & Summer Prog  
Location: 150002 CANDLER LIBRARY

To save changes made to the evaluation, select the **Save** button. The system should automatically save your work every 40 minutes, however, we suggest that you **save often** to prevent losing work. Be sure to save before exiting the system.

If you need to open documents (e.g., last year's document) while writing your review, select the "new window" link in the upper right hand corner of your screen. **DO NOT** open multiple PeopleSoft sessions within the same web browser. Doing so can create an issue with properly saving your information.

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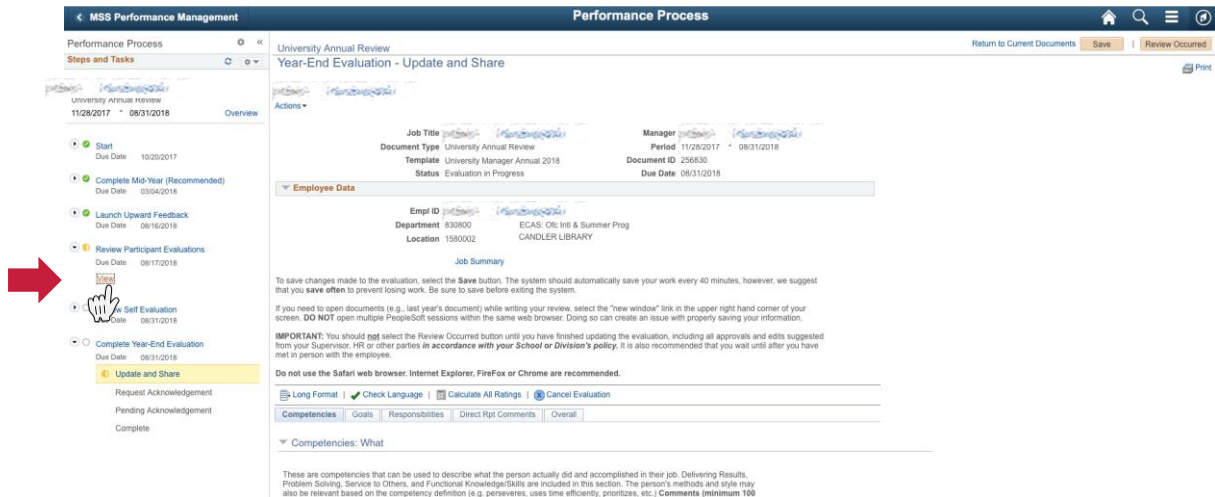
[Long Format](#) | [Check Language](#) | [Calculate All Ratings](#) | [Cancel Evaluation](#)

**Competencies** | **Goals** | **Responsibilities** | **Direct Rpt Comments** | **Overall**

**Competencies: What**

These are competencies that can be used to describe what the person actually did and accomplished in their job. Delivering Results, Problem Solving, Service to Others, and Functional Knowledge/Skills are included in this section. The person's methods and style may also be relevant based on the competency definition (e.g., perceives, uses time efficiently, prioritizes, etc.) **Comments (maximum 100)**

12) Click on “View.”



**MSS Performance Management** **Performance Process**

Performance Process **University Annual Review** [Return to Current Documents](#) [Save](#) [Review Occurred](#)

**Steps and Tasks** **Year-End Evaluation - Update and Share**

University Annual Review 11/28/2017 - 08/31/2018 Overview

- Start Due Date: 10/20/2017
- Complete Mid-Year (Recommended) Due Date: 03/04/2018
- Launch Upward Feedback Due Date: 08/16/2018
- Review Participant Evaluations** Due Date: 08/17/2018
- Review Self Evaluation Due Date: 08/31/2018
- Complete Year-End Evaluation Due Date: 08/31/2018
- Update and Share**
  - Request Acknowledgement
  - Pending Acknowledgement
  - Complete

**Employee Data**

Job Title: University Manager Annual Review  
Document Type: University Annual Review  
Template: University Manager Annual 2018  
Status: Evaluation in Progress

Manager: [User]  
Period: 11/28/2017 - 08/31/2018  
Document ID: 256830  
Due Date: 08/31/2018

**Job Summary**

Empl ID: [User]  
Department: 83000 ECAS' Ols H&L & Summer Prog  
Location: 150002 CANDLER LIBRARY

To save changes made to the evaluation, select the **Save** button. The system should automatically save your work every 40 minutes, however, we suggest that you **save often** to prevent losing work. Be sure to save before exiting the system.

If you need to open documents (e.g., last year's document) while writing your review, select the "new window" link in the upper right hand corner of your screen. **DO NOT** open multiple PeopleSoft sessions within the same web browser. Doing so can create an issue with properly saving your information.

**IMPORTANT:** You should **not** select the Review Occurred button until you have finished updating the evaluation, including all approvals and edits suggested from your Supervisor, HR or other parties **in accordance with your School or Division's policy**. It is also recommended that you wait until after you have met in person with the employee.

Do not use the Safari web browser. Internet Explorer, Firefox or Chrome are recommended.

[Long Format](#) | [Check Language](#) | [Calculate All Ratings](#) | [Cancel Evaluation](#)

**Competencies** | **Goals** | **Responsibilities** | **Direct Rpt Comments** | **Overall**

**Competencies: What**

These are competencies that can be used to describe what the person actually did and accomplished in their job. Delivering Results, Problem Solving, Service to Others, and Functional Knowledge/Skills are included in this section. The person's methods and style may also be relevant based on the competency definition (e.g., perceives, uses time efficiently, prioritizes, etc.) **Comments (maximum 100)**

13) To view each direct report's feedback of your employee, click on their names. This will launch a separate window with the feedback. Make sure your popup blocker is off.

**Participant Evaluations**

Participant	Role	Status	Due Date
<a href="#">Direct Report1</a>	Direct Report	Completed	06/17/2018
<a href="#">Participant Evaluation Link</a>	Report	Completed	06/17/2018

Return

14) You can navigate the feedback with the dropdown icons.

**Direct Report Evaluation**

University Annual Review  
Direct Report Evaluation

Job Title: [Name]  
Manager: [Name]  
Document Type: University Annual Review  
Template: University Manager Annual 2018  
Status: Completed  
Reviewer: Direct Report1  
Role: Direct Report

The document status is Completed.

Long Format | Reopen

Direct Report Comments

Expand | Collapse

**Strengths**

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

Comments: Tracey always lets us know in advance when important changes have occurred or if our priorities have changed. Tracey treats us with respect and gives us the support we need to work effectively.

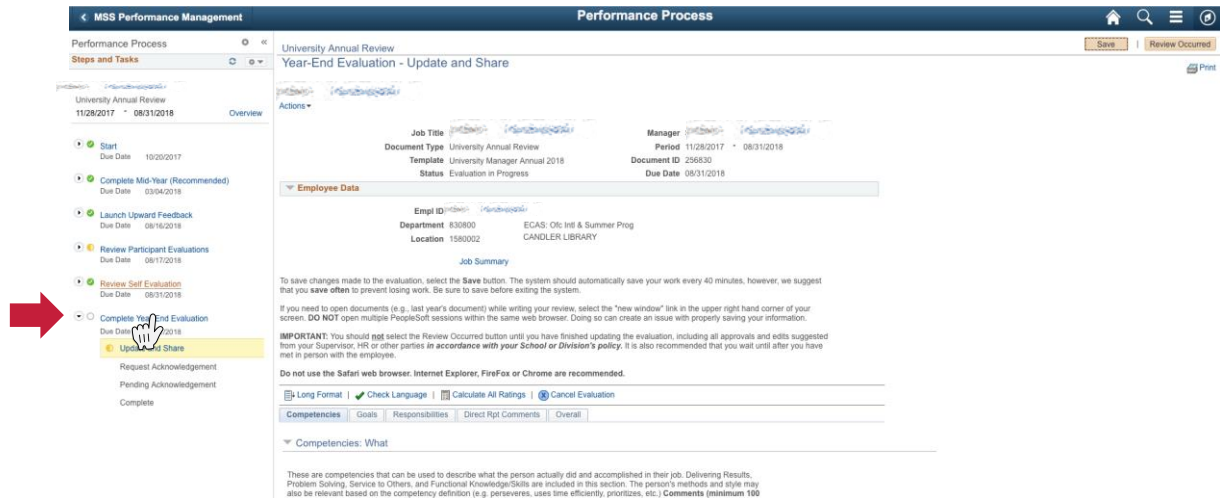
Area of Improvement

Other Comments

Audit History

15) After taking into consideration your employee's feedback, and that of their direct reports if applicable, You are ready to fill out your Year-End evaluation.

To do this, click on the "Complete Year-End Review" drop down icon.



**MSS Performance Management** Performance Process

University Annual Review  
Year-End Evaluation - Update and Share

Save | Review Occurred

Actions

Job Title: University Annual Review  
Document Type: University Manager Annual 2018  
Template: Evaluation in Progress  
Status: Evaluation in Progress

Manager: [Name]  
Period: 11/28/2017 - 08/31/2018  
Document ID: 256830  
Due Date: 08/31/2018

**Employee Data**

Empl ID: [ID]  
Department: 830800 ECAS: Of HR & Summer Prog  
Location: 156002 Candler Library

**Job Summary**

To save changes made to the evaluation, select the **Save** button. The system should automatically save your work every 40 minutes; however, we suggest that you **save often** to prevent losing work. Be sure to save before exiting the system.

If you need to open documents (e.g., last year's document) while writing your review, select the "new window" link in the upper right hand corner of your screen. **DO NOT** open multiple PeopleSoft sessions within the same web browser. Doing so can create an issue with properly saving your information.

**IMPORTANT:** You should not select the Review Occurred button until you have finished updating the evaluation, including all approvals and edits suggested from your Supervisor, HR or other parties in accordance with your School or Division's policy. It is also recommended that you wait until after you have met in person with the employee.

Do not use the Safari web browser. Internet Explorer, Firefox or Chrome are recommended.

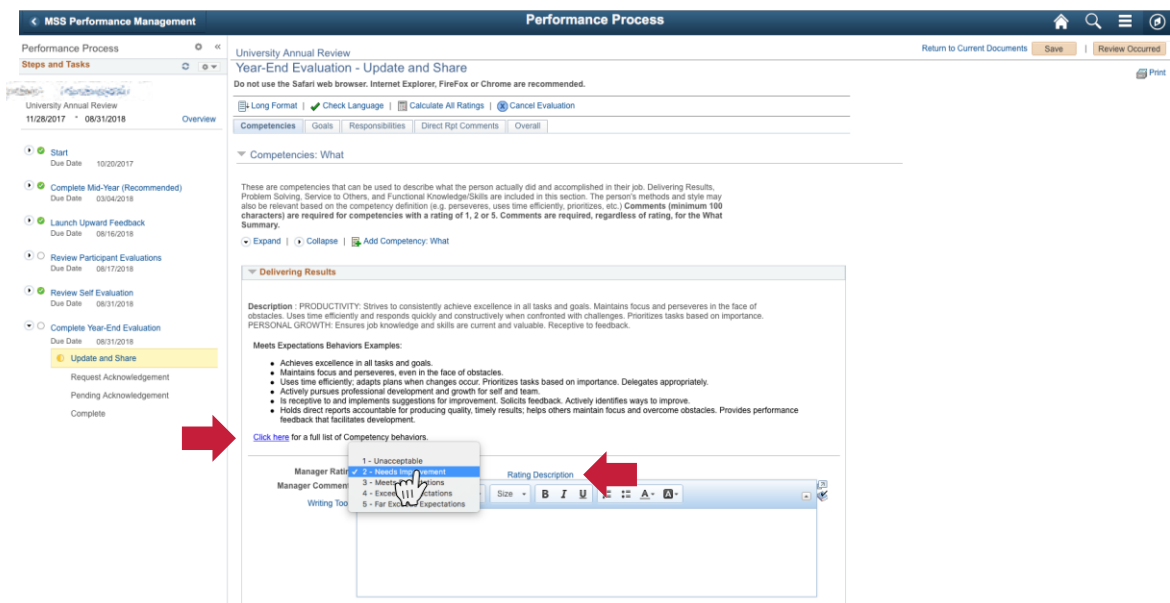
Long Format | Check Language | Calculate All Ratings | Cancel Evaluation

Competencies | Goals | Responsibilities | Direct Rpt Comments | Overall

**Competencies: What**

These are competencies that can be used to describe what the person actually did and accomplished in their job. Delivering Results, Problem Solving, Service to Others, and Functional Knowledge/Skills are included in this section. The person's methods and style may also be relevant based on the competency definition (e.g. perseveres, uses time efficiently, prioritizes, etc.) Comments (minimum 100 characters)

16) Here you can use the tabs to navigate between the Competencies, Goals, and Responsibility tabs to provide your input. For competencies, you will need to select a rating between 1 and 5. To review the rating scale and behaviors for each competency, use the "Click here" and "Rating Description" links.



**MSS Performance Management** Performance Process

University Annual Review  
Year-End Evaluation - Update and Share

Return to Current Documents | Save | Review Occurred

Do not use the Safari web browser. Internet Explorer, Firefox or Chrome are recommended.

Long Format | Check Language | Calculate All Ratings | Cancel Evaluation

Competencies | Goals | Responsibilities | Direct Rpt Comments | Overall

**Competencies: What**

These are competencies that can be used to describe what the person actually did and accomplished in their job. Delivering Results, Problem Solving, Service to Others, and Functional Knowledge/Skills are included in this section. The person's methods and style may also be relevant based on the competency definition (e.g. perseveres, uses time efficiently, prioritizes, etc.) Comments (minimum 100 characters) are required for competencies with a rating of 1, 2 or 5. Comments are required, regardless of rating, for the What Summary.

Expand | Collapse | Add Competency: What

**Delivering Results**

Description: PRODUCTIVITY: Strives to consistently achieve excellence in all tasks and goals. Maintains focus and perseveres in the face of obstacles. Uses time efficiently and responds quickly and constructively when confronted with challenges. Prioritizes tasks based on importance. PERSONAL GROWTH: Ensures job knowledge and skills are current and valuable. Receptive to feedback.

**Meets Expectations Behaviors Examples:**

- Achieves excellence in all tasks and goals.
- Maintains focus and perseveres, even in the face of obstacles.
- Uses time efficiently, adapts plans when changes occur. Prioritizes tasks based on importance. Delegates appropriately.
- Actively pursues professional development and growth for self and team.
- Is receptive to and implements suggestions for improvement. Solicits feedback. Actively identifies ways to improve.
- Holds direct reports accountable for producing quality, timely results; helps others maintain focus and overcome obstacles. Provides performance feedback that facilitates development.

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

Manager Rating: 1 - Unacceptable  
2 - Needs Improvement  
3 - Meets Expectations  
4 - Exceeds Expectations  
5 - Far Exceeds Expectations

Rating Description

Size | B | I | U | A |

- 17) Complete the comments box for each of the competencies. If you have goals and responsibilities, complete those comments as well. You must provide at least 100 characters for any rating of a 1, 2 or 5.

**MSS Performance Management** Performance Process

University Annual Review

Year-End Evaluation - Update and Share

Competencies | Goals | Responsibilities | Direct Rpt Comments | Overall

Competencies: What

These are competencies that can be used to describe what the person actually did and accomplished in their job. Delivering Results, Problem Solving, Service to Others, and Functional Knowledge/Skills are included in this section. The person's methods and style may also be relevant based on the competency definition (e.g. perseveres, uses time efficiently, prioritizes, etc.). Comments (minimum 100 characters) are required for competencies with a rating of 1, 2 or 5. Comments are required, regardless of rating, for the What Summary.

Expand | Collapse | Add Competency: What

**Delivering Results**

Description: PRODUCTIVITY: Strives to consistently achieve excellence in all tasks and goals. Maintains focus and perseveres in the face of obstacles. Uses time efficiently and responds quickly and constructively when confronted with challenges. Prioritizes tasks based on importance. PERSONAL GROWTH: Ensures job knowledge and skills are current and valuable. Responsive to feedback.

Meets Expectations Behaviors Examples:

- Achieves excellence in all tasks and goals.
- Maintains focus and perseveres, even in the face of obstacles.
- Uses time efficiently; adapts plans when changes occur. Prioritizes tasks based on importance. Delegates appropriately.
- Actively pursues professional development and growth for self and team.
- Is receptive to and implements suggestions for improvement. Solicits feedback. Actively identifies ways to improve.
- Holds direct reports accountable for producing quality, timely results; helps others maintain focus and overcome obstacles. Provides performance feedback that facilitates development.

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

Manager Rating: 2 - Needs Improvement Rating Description

Manager Comments

Writing Tools

Tracey does well in many tasks, but when it comes to using time efficiently, there is some room for improvement. Tracey spends a long time on tasks that should be completed more quickly at this stage of Tracey's career.

- 18) Don't forget the "What" and "How" summary sections, which also require comments. You may override the suggested rating for each section by clicking the "Final Rating" link, which will provide you a drop down box to select the rating you feel is most appropriate.

**MSS Performance Management** Performance Process

University Annual Review

Year-End Evaluation - Update and Share

Competencies | Goals | Responsibilities | Direct Rpt Comments | Overall

Competencies: What

**Competencies: What Summary**

Manager Rating: 3 - Meets Expectations Rating Description Final Rating

Manager Comments

Writing Tools

Listens to customers (internal and external) and addresses needs and concerns. Keeps customers informed by providing status reports and progress updates. Delivers on service commitments. Meets established or agreed upon deadlines. Maintains supportive relationships with customers. Uses initiative to improve outcomes, processes, or measurements.



- 19) If your employee has direct reports, and you received upward feedback, you may review any feedback provided in the upward feedback section mentioned earlier in step 10. You may use the tab shown below to summarize the upward feedback provided. Remember to use this information only in combination with your own observations. Do not share the comments verbatim.

**MSS Performance Management** Performance Process

University Annual Review  
Year-End Evaluation - Update and Share

Steps and Tasks: Start, Complete Mid-Year (Recommended), Launch Upward Feedback, Review Participant Evaluations, Review Self Evaluation, Complete Year-End Evaluation, **Update and Share**

Job Title: University Annual Review  
Document Type: University Manager Annual 2018  
Template: University Manager Annual 2018  
Status: Evaluation in Progress

Manager: [Name]  
Period: 11/28/2017 - 08/31/2018  
Document ID: 256839  
Due Date: 08/31/2018

**Employee Data**  
Empl ID: [ID]  
Department: 830800  
Location: 1580002  
ECAS: Olt Int & Summer Prog  
CANDLER LIBRARY

**Job Summary**  
To save changes made to the evaluation, select the **Save** button. The system should automatically save your work every 40 minutes, however, we suggest that you **save often** to prevent losing work. Be sure to save before exiting the system.

**IMPORTANT:** You should not select the Review Occurred button until you have finished updating the evaluation, including all approvals and edits suggested from your Supervisor, HR or other parties in accordance with your School or Division's policy. It is also recommended that you wait until after you have met in person with the employee.

Do not use the Safari web browser. Internet Explorer, Firefox or Chrome are recommended.

Long Format | Check Language | Calculate All Ratings | Cancel Evaluation

Competencies | Goals | Responsibilities | **Direct Rpt Comments** | Overall

**Direct Report Comments**  
Expand | Collapse

Strengths  
Area of Improvement  
Other Comments

- 20) If the employee had goals or responsibilities, make sure to review those as well and provide an overall assessment of how well they did on those goals and/or responsibilities. Finally, you will want to provide an overall assessment for your employee. This is where you give the overall assessment of their performance. Click on the "Overall" tab.

**MSS Performance Management** Performance Process

University Annual Review  
Year-End Evaluation - Update and Share

Steps and Tasks: Start, Complete Mid-Year (Recommended), Launch Upward Feedback, Review Participant Evaluations, Review Self Evaluation, Complete Year-End Evaluation, **Update and Share**

Job Title: University Annual Review  
Document Type: University Manager Annual 2018  
Template: University Manager Annual 2018  
Status: Evaluation in Progress

Manager: [Name]  
Period: 11/28/2017 - 08/31/2018  
Document ID: 256839  
Due Date: 08/31/2018

**Employee Data**  
Empl ID: [ID]  
Department: 830800  
Location: 1580002  
ECAS: Olt Int & Summer Prog  
CANDLER LIBRARY

**Job Summary**  
To save changes made to the evaluation, select the **Save** button. The system should automatically save your work every 40 minutes, however, we suggest that you **save often** to prevent losing work. Be sure to save before exiting the system.

**IMPORTANT:** You should not select the Review Occurred button until you have finished updating the evaluation, including all approvals and edits suggested from your Supervisor, HR or other parties in accordance with your School or Division's policy. It is also recommended that you wait until after you have met in person with the employee.

Do not use the Safari web browser. Internet Explorer, Firefox or Chrome are recommended.

Long Format | Check Language | Calculate All Ratings | Cancel Evaluation

Competencies | Goals | Responsibilities | Direct Rpt Comments | **Overall**

**Overall Summary**

Click here for descriptions of Overall Rating Scores. This is only an average. If the employee's performance is low/high in one or more critical areas (competencies or goals), you may need to override this score by clicking the Final Rating link. Click calculator icon for average of ratings. Comments are required (minimum 100 characters) regardless of rating.

Manager Rating: 3 - Meets Expectations 3.00 Final Rating

Manager Comments Writing Tools



- 21) You will want to select a rating, and write a summary of your reasoning and thoughts on their performance. You may override the suggested rating by clicking the “Final Rating” link, which will provide you a drop down box to select the rating you feel is most appropriate.

**MSS Performance Management** **Performance Process**

University Annual Review  
Year-End Evaluation - Update and Share

Actions

Job Title: [Blank] Document Type: University Annual Review Manager: [Blank]  
Template: University Manager Annual 2018 Period: 11/28/2017 - 08/31/2018  
Status: Evaluation in Progress Document ID: 256839 Due Date: 08/31/2018

**Employee Data**

Empl ID: [Blank] Department: ECAS: Ofc Int & Summer Prog  
Location: 1580002 CANDLER LIBRARY

Job Summary

Long Format | Check Language | Calculate All Ratings | Cancel Evaluation

Competencies | Goals | Responsibilities | Direct Rpt Comments | Overall

**Overall Summary**

Click here for descriptions of Overall Rating Scores. This is only an average. If the employee's performance is low/high in one or more critical areas (competencies or goals), you may need to override this score by clicking the Final Rating link. Click calculator icon for average of ratings. Comments are required (minimum 100 characters) regardless of rating.

Manager Rating: 3 - Meets Expectations 3.00 Final Rating

Manager Comments

Writing Tools

Tracey does well in many tasks, but when it comes to using time efficiently, there is some room for improvement. Tracey spends a long time on tasks that should be completed more quickly at this stage of Tracey's career.

- 22) Save by clicking on the “Save” button. When you are comfortable with your evaluation, you are ready to perform a meeting with your employee to discuss their Year-End Review. This meeting should be similar to the Mid-Year Review.

**MSS Performance Management** **Performance Process**

University Annual Review  
Year-End Evaluation - Update and Share

Actions

Job Title: [Blank] Document Type: University Annual Review Manager: [Blank]  
Template: University Manager Annual 2018 Period: 11/28/2017 - 08/31/2018  
Status: Evaluation in Progress Document ID: 256839 Due Date: 08/31/2018

**Employee Data**

Empl ID: [Blank] Department: ECAS: Ofc Int & Summer Prog  
Location: 1580002 CANDLER LIBRARY

Job Summary

Long Format | Check Language | Calculate All Ratings | Cancel Evaluation

Competencies | Goals | Responsibilities | Direct Rpt Comments | Overall

**Overall Summary**

You have successfully saved your evaluation.

To save changes made to the evaluation, select the Save button. The system should automatically save your work every 40 minutes, however, we suggest that you save often to prevent losing work. Be sure to save before exiting the system.

If you need to open documents (e.g., last year's document) while writing your review, select the "new window" link in the upper right hand corner of your screen. **DO NOT** open multiple PeopleSoft sessions within the same web browser. Doing so can create an issue with properly saving your information.

**IMPORTANT:** You should not select the Review Occurred button until you have finished updating the evaluation, including all approvals and edits suggested from your Supervisor, HR or other parties in accordance with your School or Division's policy. It is also recommended that you wait until after you have met in person with the employee.

Do not use the Safari web browser. Internet Explorer, Firefox or Chrome are recommended.

Long Format | Check Language | Calculate All Ratings | Cancel Evaluation

Competencies | Goals | Responsibilities | Direct Rpt Comments | Overall

**Overall Summary**

Click here for descriptions of Overall Rating Scores. This is only an average. If the employee's performance is low/high in one or more critical areas (competencies or goals), you may need to override this score by clicking the Final Rating link. Click calculator icon for average of ratings. Comments are required (minimum 100 characters) regardless of rating.

Save

23) After you complete your Year-End Review in person with your employee, return to the document and click on “Review Occurred.”

The screenshot shows the 'MSS Performance Management' interface. On the left, a 'Steps and Tasks' sidebar lists various review stages, with 'Update and Share' currently selected. The main area displays 'University Annual Review - Update and Share'. At the top right of this section, there are buttons for 'Save', 'Review Occurred', and 'Print'. A red arrow points directly to the 'Review Occurred' button. Below these buttons, there is a section for 'Employee Data' with fields for Job Title, Document Type, Template, Status, Manager, Period, Document ID, and Due Date. Further down, there is a 'Manager Rating' section with a dropdown menu set to '3 - Meets Expectations' and a 'Final Rating' of 3.00. A 'Manager Comments' text area contains a sample comment about an employee named Tracey.

24) You will be asked to confirm this step. Select “Confirm.”

This screenshot shows the same 'MSS Performance Management' interface as the previous one, but with a confirmation dialog box open. The dialog box is titled 'Review Occurred' and contains the text: 'You have chosen to confirm that the performance review occurred for this document. To confirm that a review was conducted, select the CONFIRM button.' There are two buttons at the bottom of the dialog: 'Confirm' and 'Cancel'. A red arrow points to the 'Confirm' button. In the background, the 'Update and Share' section is visible, and the 'Review Occurred' button from the previous screenshot is still present.

25) You will receive the confirmation screen. This documents your meeting and sends the document to your employee. The employee will have the opportunity to make comments and acknowledge the review.

**MSS Performance Management** **Performance Process**

Performance Process **University Annual Review**  
Confirmation - Acknowledgement Requested

✓ You have successfully marked the review occurred for your evaluation.

**Steps and Tasks**

- Start Due Date: 10/20/2017
- Complete Mid-Year (Recommended) Due Date: 03/04/2018
- Launch Upward Feedback Due Date: 08/16/2018
- Review Participant Evaluations Due Date: 08/17/2018
- Review Self Evaluation Due Date: 08/31/2018
- Complete Year-End Evaluation Due Date: 08/31/2018
  - Update and Share
  - Request Acknowledgement**
  - Pending Acknowledgement
  - Complete

26) Once your employee acknowledges the review, you will want to complete and close the Year-End performance evaluation. You will be able to respond to their comments.

**MSS Performance Management** **Performance Process**

Performance Process **University Annual Review**  
Year-End Evaluation - Complete

Return to Current Documents Save Complete

**Steps and Tasks**

- Start Due Date: 10/20/2017
- Complete Mid-Year (Recommended) Due Date: 03/04/2018
- Launch Upward Feedback Due Date: 08/16/2018
- Review Participant Evaluations Due Date: 08/17/2018
- Review Self Evaluation Due Date: 08/31/2018
- Complete Year-End Evaluation** Due Date: 08/31/2018
  - Update and Share
  - Request Acknowledgement
  - Pending Acknowledgement
  - Complete**

**Job Summary**

The current status of this evaluation is Acknowledged. In this status, you may enter comments in the Manager Comments section, if applicable. To mark the evaluation as completed, select the Complete button. You should not select Complete until you have met with the employee and are finished providing comments.

Long Format | Reopen

Competencies Goals Responsibilities Direct Rpt Comments Overall

**Overall Summary**

**Manager Rating** 3 - Meets Expectations 3.00

**Manager Comments**

Tracey does well in many tasks, but when it comes to using time efficiently, there is some room for improvement. Tracey spends a long time on tasks that should be completed more quickly at this stage of Tracey's career.

**Employee Comments**

Thank you for your review. I believe I was a bit better at delivering results.

**Manager Comments**

←

27) When you are finished, click on “Complete”

The screenshot shows the 'MSS Performance Management' interface. The main heading is 'Performance Process'. On the left, a sidebar lists 'Steps and Tasks' for the 'University Annual Review' process, with 'Complete Year-End Evaluation' selected. The main content area is titled 'Year-End Evaluation - Complete' and includes a 'Job Summary' section. Below this, there are tabs for 'Competencies', 'Goals', 'Responsibilities', 'Direct Rpt Comments', and 'Overall'. The 'Overall Summary' section shows a 'Manager Rating' of 3 - Meets Expectations. There are text boxes for 'Manager Comments' and 'Employee Comments'. In the top right corner, there are buttons for 'Return to Current Documents', 'Save', and 'Complete'. A red arrow points to the 'Complete' button.

28) You will be asked to confirm. Click on “Confirm.”

This screenshot shows the same 'Year-End Evaluation - Complete' screen as the previous one, but with a 'Complete Evaluation' dialog box open in the center. The dialog box contains the text: 'To complete the evaluation click the CONFIRM button. To return to the evaluation, select Cancel.' There are two buttons: 'Confirm' and 'Cancel'. A red arrow points to the 'Confirm' button. The background is slightly dimmed.

29) You will receive confirmation you completed the Year-End Review. Congratulations! You have completed a full Performance Review Cycle.

