Step-by-Step Guide to the Performance Management Tool for Managers
1. To access the Performance Management Tool, log on to Self Service/PeopleSoft at http://leo.cc.emory.edu

2. Click Manager Self Service

3. Click Performance Management
4. Click **Create Documents**

5. For the date, use the default date provided

6. Click **Continue**
7. A list of your direct reports will be displayed by name. Select the employee(s) you wish to rate. Then, click **Continue**.
8. Set the evaluation period. For an annual review, in most cases, this period will be Sept. 1 to Aug. 31. Some use the academic calendar. Check with your HR Rep if you are unsure.

9. Select Performance Document

10. Choose your Template. BE CAREFUL to choose the right template:
   - If you are rating a direct report that is a manager, select EU Mgr Annual (Rate Mgr)
   - For a non-manager, select EU Non-Mgr Annual (Rate NonMgr)
   - If you are doing a mid-year review, then select the MidYr version of the appropriate form

11. When finished, click Create Documents
12. You have now created your form. An email has automatically been sent to your direct report notifying them that the process has started and asking them to complete their self-evaluation. To continue, click **Current Documents**.

13. Select the employee from the list displayed by clicking **Performance Document** next to their name.
14. On the Complete Manager Evaluation row, click **Start**.

Note: Once your direct report completes their self-evaluation, you will be able to access it here.
15. You can now begin to write your evaluation. Select **Expand All** to see each of the competencies. There are 8 competencies to evaluate.

16. Comments and ratings are required for each competency. Links to rating definitions & behavioral examples are provided to assist you.

Note: you may save and return to complete the evaluation as many times as you need to.
17. You also have space to add **Goals**, if applicable.

To calculate the suggested rating, select the calculator icon.

18. An **overall rating** is required. A suggested overall rating will be provided, based on the average of your competency ratings. You may override this rating as you deem fit by selecting Final Rating.
19. You may also calculate the suggested rating by scrolling down and clicking **Calculate All Ratings**.

20. When finished, including any reviews required from your supervisor or others in accordance with your division/school policy, select **Available for Review**. You should meet face to face with your direct report prior to making it available for review.

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**Note:** You can create a pdf draft of your evaluation to print or email to others (as appropriate) by selecting this printer icon.
21. Because the employee will be able to see the form once the status is changed to *Available for Review*, the system will ask you to confirm that you wish to move forward. If so, click **OK**.

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**Performance Document**

**Available for Review**

*You should meet with the employee before you select OK.* Selecting OK allows the employee to view the evaluation. Select Cancel if you have not met with the employee.

The overall rating you have assigned to this document is **3 - Meets Expectations**.
22. Next, click **Mark Review Held**. This confirms that you held an in person review with the employee.
23. Click **Review Held**. At this point, an email will be sent to the employee requesting that they **Acknowledge the Review**.

**Note:** There is also a **Reopen** button. If you have not yet selected **Review Held**, you can pull the review out of **Available for Review** to make additional edits. Scroll down the page for the **Reopen** button.
24. After selecting **Review Held**, once again the system will ask you to confirm you wish to move forward to this status. Click **OK**.
25. Once the employee has acknowledged the review, then you should complete it to close it out. Follow the steps below.
26. Once complete, the document will move from **Current Document** to **Historical Documents** within your account. You are now finished.