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
4a. IF HR has already created documents for your school/division, then go to Current Documents and skip to step 13. Otherwise go to 4b.

4b. 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 begin and end dates, which 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 FY16")

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 FY16
- For a non-manager, select EU Non-Mgr Annual FY16
- 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. IF you are rating a non-mgr, this is the next screen you will see. 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.

NOTE: IF you are rating a manager, your screen will look different (although steps 14-23 still apply). Be sure to review steps 24-30 as well.
15. You can now begin to write your evaluation. Select **Expand All** to see all 8 competencies.

16. **NEW**: Ratings are required for each competency; however, comments are only required for ratings of 1, 2 or 5 (box will appear). Comments are required, regardless of rating, for the WHAT and HOW Summary, and the Overall rating.

*Note:* you may save and return to complete the evaluation as many times as you need. **SAVE OFTEN.**

Links to rating definitions & behavioral examples are provided to assist you.
17. You also have space to add **Goals**, if applicable.

18. An **overall rating and comments are 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.

To calculate the suggested rating, select the calculator icon.
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 **Review Occurred**. You should meet face to face with your direct report **prior** to selecting this.

**Note:** You can create a pdf draft of your evaluation to print or email to others (as appropriate) by selecting this printer icon.
21. After selecting **Review Occurred**, once again the system will ask you to confirm you wish to move forward to this status. Click **OK**. At this point, an email will be sent to the employee requesting that they **Acknowledge the Review**.
22. Once the employee has acknowledged the review, then you should mark it complete. Follow the steps below.

- Review Self Evaluation is completed.
- Complete Manager Evaluation is acknowledged.
- Mark the evaluation as completed by selecting the Complete button.
23. Once complete, the document will move from **Current Document** to **Historical Documents** within your account. You are now finished. If you have managers to evaluate, please review the next section on Upward Feedback.
Upward Feedback
24. If you are evaluating a manager, then after step 14, you will see the screen below. Start sending upward feedback forms by nominating participants (2 or more required). If the manager has less than two direct reports then skip and go to “Complete Manager Evaluation”.

The process for completing a manager evaluation form is the same as for a non-mgr. See step 14.
25. Names of the supervisor’s direct reports are automatically displayed.

26. If the list is correct, press Save. If incorrect, contact HR.

27. The system will then contact (via email) each direct report to provide upward feedback.
28. Use Track Nominations to review status.

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**Performance Document Details**

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<thead>
<tr>
<th>Employee</th>
<th>Sample Employee3</th>
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<tbody>
<tr>
<td>Document Type</td>
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<tr>
<td>Template</td>
<td>EU Mgr Annual FY16</td>
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<tr>
<td>Manager</td>
<td>Mike Manager</td>
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**Document Progress**

<table>
<thead>
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<th>Step</th>
<th>Status</th>
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<tbody>
<tr>
<td>Nominate Participants</td>
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<td>Edit</td>
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<tr>
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<td>In Progress</td>
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<td>Edit</td>
</tr>
<tr>
<td>Review Participant Evaluations</td>
<td>In Progress</td>
<td>05/12/2016</td>
<td>View</td>
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<td>Not Started</td>
<td>05/26/2016</td>
<td></td>
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<tr>
<td>Complete Manager Evaluation</td>
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<td>05/26/2016</td>
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</tbody>
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**Track Nominations**

Sample Employee3  Mgr, Training  Performance Document

- Participant Role: Direct Report

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<tr>
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<td>Accepted</td>
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<tr>
<td>Direct Report3</td>
<td>Pending</td>
</tr>
</tbody>
</table>

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*Note that actual names are removed, to keep anonymous.*
29. Select View to review upward feedback. You need at least 2 returned in order to View.

30. Select a participant to review responses (ie. upward feedback).
Note that actual name is removed, to keep anonymous.

Responses are shown underneath each question in Comments. Responses to all 3 questions are not required. Please use this information carefully, in combination with your own observations when writing your evaluation (steps 14 – 23).