PERFORMANCE MANAGEMENT SYSTEM EMPLOYEE GUIDE
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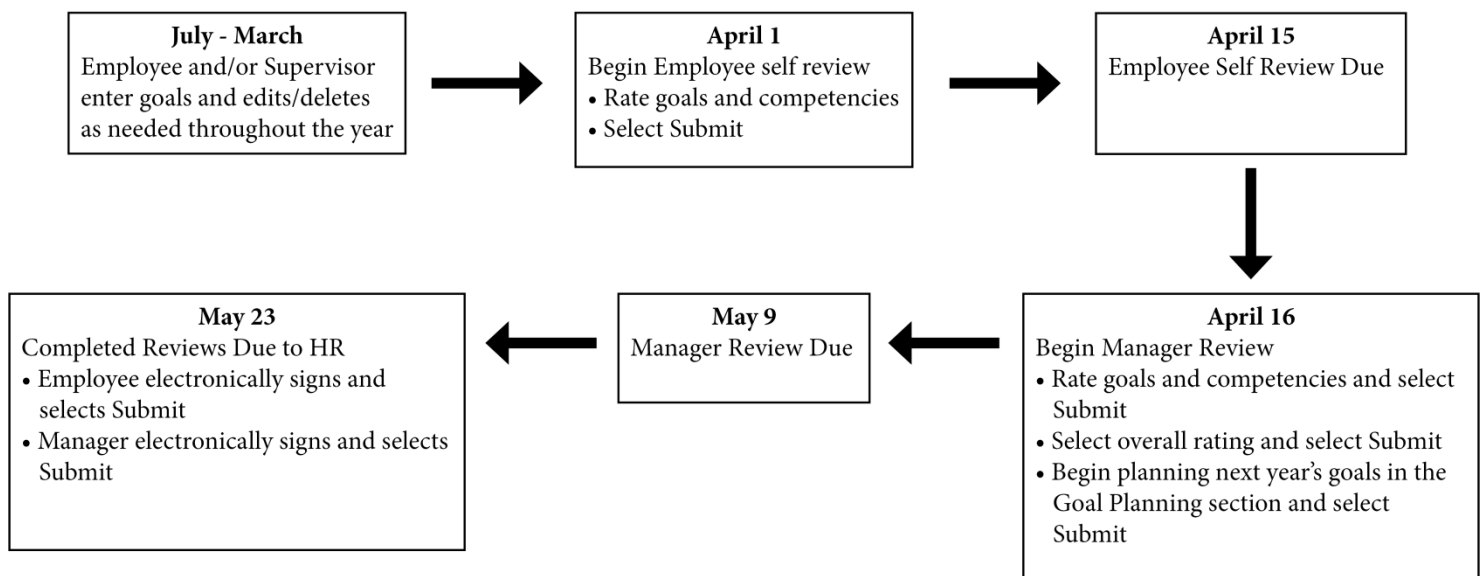
PROCESS AND SYSTEM INFORMATION

Performance Management Process

1) July - March: Employee and/or Manager enter goals and edits/deletes as needed throughout the year.
2) April: System automatically releases self-assessment to employee, who rates him/herself on all goals and competencies.
3) Mid-April: System moves evaluation to manager, who rates the employee's goals, competencies, and overall performance.
   a. Once manager is finished rating, the system moves the evaluation into a "Goal Planning" phase where the manager and employee can begin entering goals for the next cycle.
   b. Manager and employee electronically sign the evaluation and it is closed out for the year. Any goals that were entered during the "Goal Planning" phase will be copied to the Goals page under the Performance tab.

Suggested Performance Management Timeline

July - March Employee and/or Supervisor enter goals and edits/deletes as needed throughout the year	→	**April 1** Begin Employee self review • Rate goals and competencies • Select Submit	→	**April 15** Employee Self Review Due

May 23 Completed Reviews Due to HR • Employee electronically signs and selects Submit • Manager electronically signs and selects Submit	←	**May 9** Manager Review Due	←	**April 16** Begin Manager Review • Rate goals and competencies and select Submit • Select overall rating and select Submit • Begin planning next year's goals in the Goal Planning section and select Submit

Accessing Career Pathway

1) Log in to DrexelOne (http://one.drexel.edu).
2) Select the Employees tab.
3) Select Career Pathway under the Development & Certifications heading.

Questions? Contact the Learning & Development Team at hrlearn@drexel.edu.

GOALS, COMPETENCIES, AND GOAL COMMENTS

Creating Goals

You and your supervisor should agree on the goals that will be entered into the system. Your supervisor will be able to see the goals that you enter through their My Team tab.

1) Select the Performance tab.
2) Select ⊙ Create .
3) Enter goal Title and Description information.
4) Change Start and Due Dates, if necessary: The dates will default to the start and end dates of the performance cycle (July 1 – June 30).
5) Upload any applicable attachments by selecting ⊕ next to Attachments. You can also add Attachments throughout the year.
6) Select one of the following options:
    a. Save as Draft : Select if you are not yet ready to save the goal.
    b. Cancel : Select if you do not wish to save the goal.
    c. Submit : Select if you are finished drafting your goal and you want to save it.
    d. ✓ : Select if you would like to spellcheck the goal that you drafted. You may select spellcheck prior to saving your goal as a draft or submitting your goal.
7) Once you select Submit, your goal will be displayed on the Goals page under the Performance tab.

Editing Goals

As priorities and schedules change throughout the year, you have the ability to edit your goals as necessary.

1) Select the Performance tab.
2) Select 📝 in the Options column for the appropriate goal.
3) Make the changes to the goal Title, Description, Start and Due Dates, or Attachments.
4) Select Submit Changes .
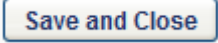
Deleting Goals

Goals can be deleted throughout the year as you and your supervisor see fit.

1) Select the Performance tab.
2) Select ✖ in the Options column for the appropriate goal.
3) Select Yes to delete the goal.

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Changing Goal Progress

As you complete your goal throughout the year, you can update the Progress percentage that is displayed on the Goals page. *Updating the Goal Progress is not mandatory; it is an optional tool.*

1) Select the Performance tab
2) Select the goal title under the My Goals heading
3) Update the % in the text field next to Progress.
4) Select [Save] or [Save and Close].

Viewing Competencies

Drexel's core competencies are listed on the Competencies page under the Performance tab. The Shared Values competency has been added that encompasses the Shared Values that are outlined in the 2012-2017 Strategic Plan. Use the How do the Shared Values relate to my job/role? and Shared Values Behavior Examples documents to better understand how you can apply the Shared Values to your position.

There is no further action required on the Competencies page. Once your self-assessment is released by the system in April, you and your manager will have access to rate your performance for each competency.

Adding, Editing, and Deleting Comments

Career Pathway allows you and your manager to write comments for a particular goal throughout the year. You can use the Comments section to update the progress on a goal or track milestones. *Adding comments is not mandatory; it is an optional tool.*
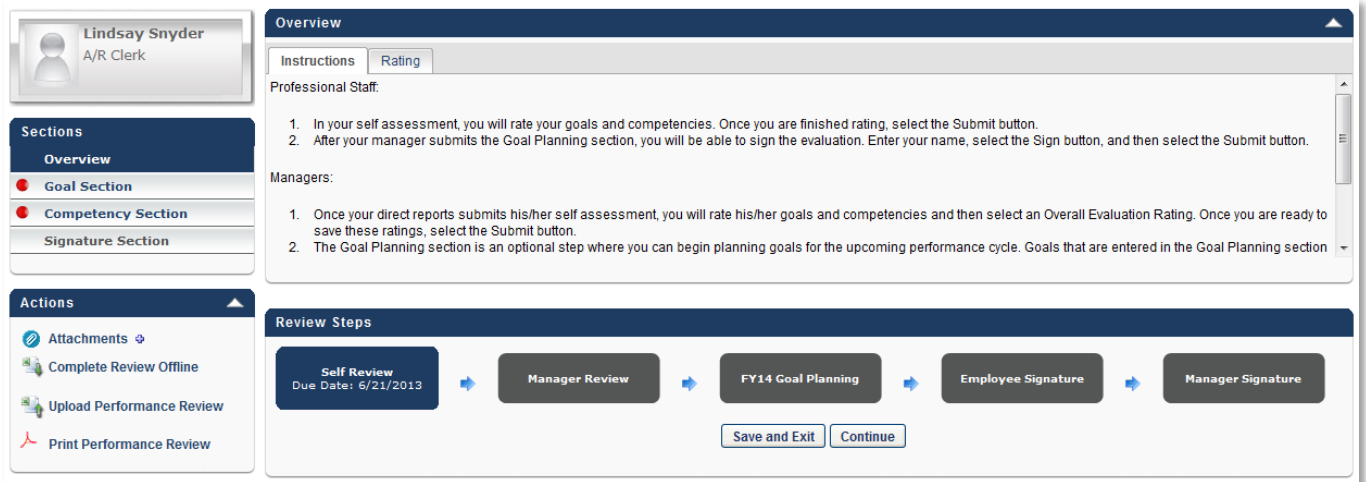
1) Select the Performance tab.
2) Select the goal title under the My Goals heading.
3) Select ✛ next to the Comments heading.
4) Enter your comment text. Select [ABC✓] to check the spelling.
5) Select [Save].
6) To edit your comment, select ✎ on the far right, make your changes, and select [Save].
7) To delete your comment, select 🗑 and then [Yes]. Be aware that once you delete your comment you cannot retrieve it.

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EMPLOYEE SELF REVIEW: RATING YOUR GOALS AND COMPETENCIES

Completing Your Self Review
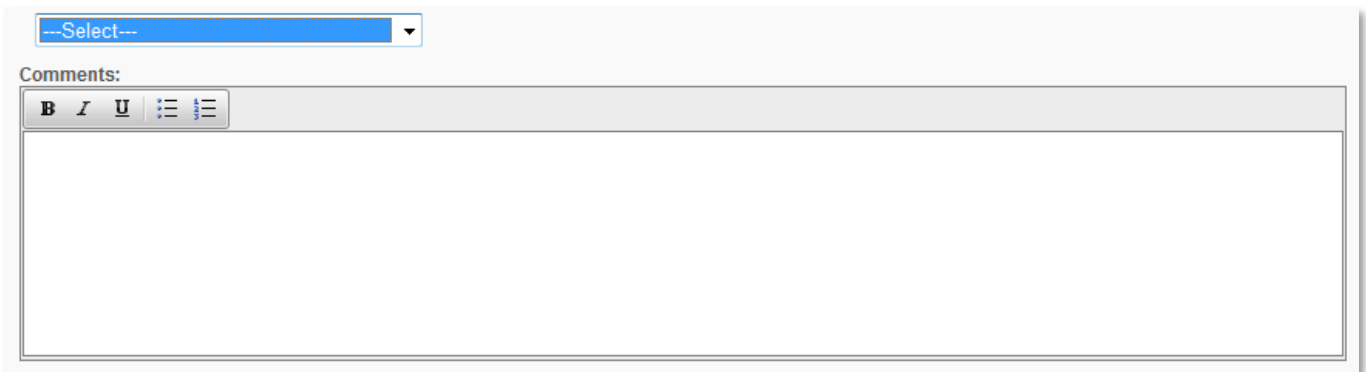
The system will automatically release your self review in April. It will include the goals that you have entered into the system and the Drexel competencies (shown on the Competencies page under the Performance tab and described on page 4).

1) Hover over the Performance tab and select Performance Reviews from the drop down menu.

2) Select under the My Assigned Reviews tab.

3) Select the appropriate section under the Sections list or Continue at the bottom of the page.


4) For each of your goals, select a rating from the drop down menu and enter any comments in the field below. Entering comments is optional, but we suggest entering a summary of your accomplishments so that your manager can make an informed decision when he/she is selecting a rating for your goal.
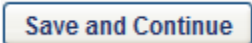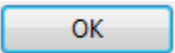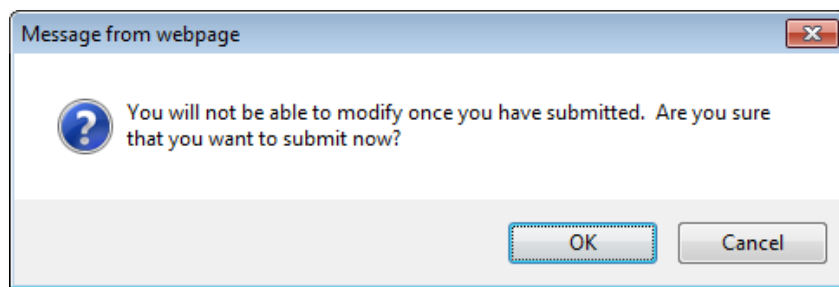
5) Select .

6) For each of the competencies, select a rating from the drop down menu and enter any comments in the field below. Entering comments is optional, but we suggest entering a summary of your accomplishments so that your manager can make an informed decision when he/she is selecting a rating

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for that competency.
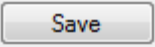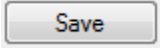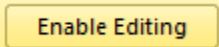
[---Select--- ▾]

Comments:

B *I* <u>U</u> | ☰ ☱

7) Select [Save and Continue].

8) On the Summary page, review the ratings that you selected for your goals and competencies. If you would like to change a rating, select the Goal or Competency Section links in the Sections sidebar and change the drop down menu accordingly. If you are finished rating your goals and competencies, select [Submit].

9) The system will verify that you are ready to submit your self review. Select [OK] to submit.

Message from webpage ⬛

❓ You will not be able to modify once you have submitted. Are you sure that you want to submit now?

[OK] [Cancel]
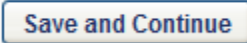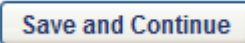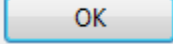
Completing Your Self Review Offline
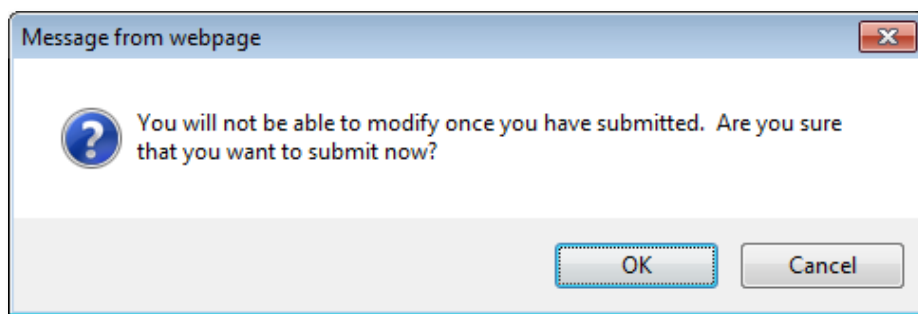
Your self review can also be completed entirely offline using Microsoft Excel.

1. Select [🔽 Complete Review Offline] in the Actions box on the left-hand side of the page.

2. When the Excel dialog box appears, select [Save] and navigate to where you would like to save your review. If you like, you can change the name that the file will be saved as.

3. Select [Save].

4. In the Excel Document

   a. Select [Enable Editing] in the ribbon at the top of the screen, if necessary.

   b. Overview Tab: This tab contains instructional information such as the rating scale description and information about the offline performance review form.

   c. Goal Section Tab: The rating scale will display at the top of this tab. Your goals will be listed starting on row 24.

      i. Select the rating for each goal in column F.

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ii. Enter comments for each goal in column G. Entering comments is optional, but we suggest entering a summary of your accomplishments so that your manager can make an informed decision when he/she is selecting a rating for your goal.

iii. Save the document.

d. Competency Section Tab: The rating scale will display at the top of this tab. The competencies will be listed starting on row 24.

i. Select the rating for each competency in column C.

ii. Enter comments for each goal in column D. Entering comments is optional, but we suggest entering a summary of your accomplishments so that your manager can make an informed decision when he/she is selecting a rating for your goal.

iii. Save and close the document.
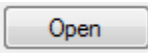
5. In Career Pathway

a. Select ![Upload Performance Review] in the Actions box on the left-hand side of the page.

b. Select ![Browse...], navigate to where you saved the performance review file, and select ![Open].

c. Select ![Upload File].

d. Select ![Save]. The ratings and comments that you entered for your goals and competencies will now display in the online performance review.

e. Select the Goal section. Your ratings and comments will display. Select ![Save and Continue].

f. The Competencies section will display with your ratings and comments. Select ![Save and Continue].

g. The Summary section will display. Double check your ratings and then select ![Submit].

h. The system will verify that you are ready to submit your self review. Select ![OK] to submit.

Message from webpage

You will not be able to modify once you have submitted. Are you sure that you want to submit now?

OK   Cancel

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Adding Attachments to Your Self Review
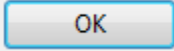
You have the ability to add up to three attachments to your self review. If you would like to add more than three attachments, you can do so through the Goals page under the Performance tab. See Creating Goals, Step 5 on page 3 for instructions.

1. Select ⊘ Attachments ⊕ in the Actions box on the left-hand side of the page.
2. Select Browse... , navigate to where you saved the performance review file, and select Open .
3. Select Upload . The file will be displayed in the Actions box.
    a. To delete the attachment, select 🗑 next to the file name.

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GOAL PLANNING: THINKING ABOUT NEXT FISCAL YEAR'S GOALS

Once your manager submits his/her overall evaluation rating, the evaluation is moved to the Goal Planning step. This step provides an optional opportunity for you and your manager to begin thinking about the goals that you will complete during the upcoming performance cycle. Our suggestion is to use this section to enter general outlines or a rough draft of your upcoming goals. Once your manager saves your goals in this section, they will be copied to the Goals page under the Performance tab, where you and your manager can update, add, and delete goals closer to the upcoming performance cycle. ***Regardless of if you begin adding goals in this step or not, your manager must submit this section of the evaluation.***

Your manager will complete the following steps. You will not have access to add goals through the Goal Planning step in the performance review cycle. If your manager would like you to add the goals during the Goal Planning step, you can add goals on the Goals page under the Performance tab as shown on page 3. If this is the case, your manager will only need to complete steps 8 and 9 below.
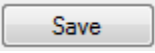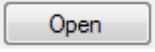
1) Select the Goal Planning section from the left navigation bar.

2) Select [Add Goals]. You may need to disable your pop-up blocker to proceed.

3) Enter the goal title and description.

4) Change the start and end dates as necessary to correspond to the upcoming performance cycle.

5) Add Attachments by selecting ✚ next to the Attachments heading.

6) Select [Save] when you are finished drafting the goal.

7) Once the goal is saved, it is copied to the Goals page under the Performance tab, where you and your employee can edit or delete it as necessary.

8) Once you are finished entering goals for the upcoming performance cycle, or if you do not wish to enter goals for the upcoming performance cycle at this time, select [Submit].

9) The system will verify that you are ready to submit. Select [OK] to submit.

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SIGNING AND PRINTING YOUR EVALUATION

Signing Your Performance Review

1) You now have the ability to view your manager's ratings and comments for your goals and competencies.
2) Select the Signature Section on the left navigation bar.
3) Type your name in the text box next to the Self label.
4) Select [Sign]. Once the page refreshes, your signature will be saved with a time stamp.
5) Select [Submit].
6) Once your manager signs and submits his/her signature, the evaluation will be closed out and you will be able to access it in your past evaluations.
    a. Select the Performance Reviews under the Performance tab.
    b. Select the checkbox next to "Show completed and expired tasks".
    c. Select the title of the performance review to view the full document.

Printing Your Self Review

1. Select ⅄ Print Performance Review in the Actions box on the left-hand side of the page.
2. When the File Download dialog box appears, select [Save] and navigate to where you would like to save your review. If you like, you can change the name that the file will be saved as.
3. Select [Save].
4. To view, select [Open].