Employee Step-by-Step Guide for Performance Evaluations

Step	Due By	Page
Your manager will create an evaluation for you	July	2
Determine and enter SMART goals • Performance Goals • Development Goals	July	2
Enter notes about your performance	April	3
Your mamanger will move your evaluation into the Assessment phase	April	4
Complete your self assessment and submit the evaluation to your manager	May	4
Your manager will evaluate your performance	May	4
Your manager will give you a copy of the evaluation to review	Mid-May	5
Discuss the evaluation with your manager	Mid-May	6
Your manager will revise the evaluation as needed (after your discussion)	Mid-May	6
Your manager will have your department/division review and approve the evaluation, if applicable	End of May	6
Your manager will revise the evaluation as needed (after department/division approval)	End of May	6
Your manager will move the evaluation to the Review phase	End of May	7
Employee and Manager review and sign the evaluation	End of May	7
Human Resources moves the completed evaluation into your employee's My Past Evaluations	July	8

Troubleshooting

Logging into the Performance Evaluation Software

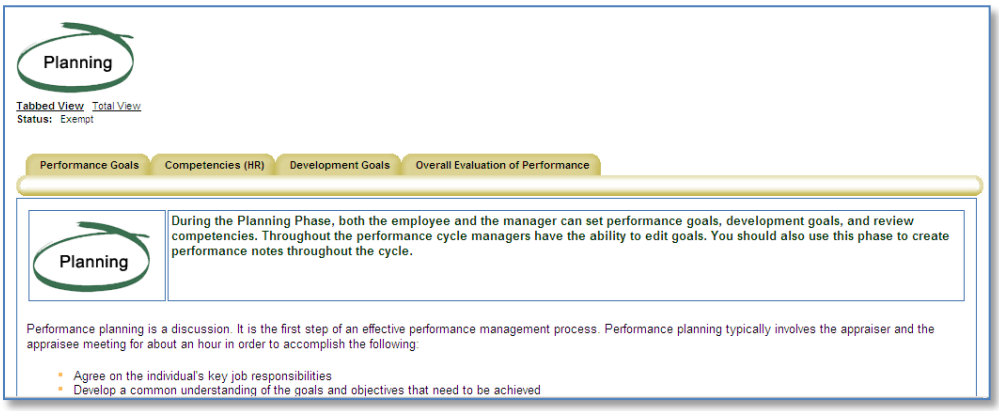
1) Sign into DrexelOne and select the Employees tab.
2) Select More BannerWeb Employee Services.
3) Select Performance Management. If after selecting the link you only see a blank screen, you will need to disable your pop-up blocker:
    a. Click on the bar that appears under the URL field on the browser.
    b. Select "Always Allow Pop-ups from this Site."
    c. Select the Performance Management link again.

Creating an Evaluation For Your Employee

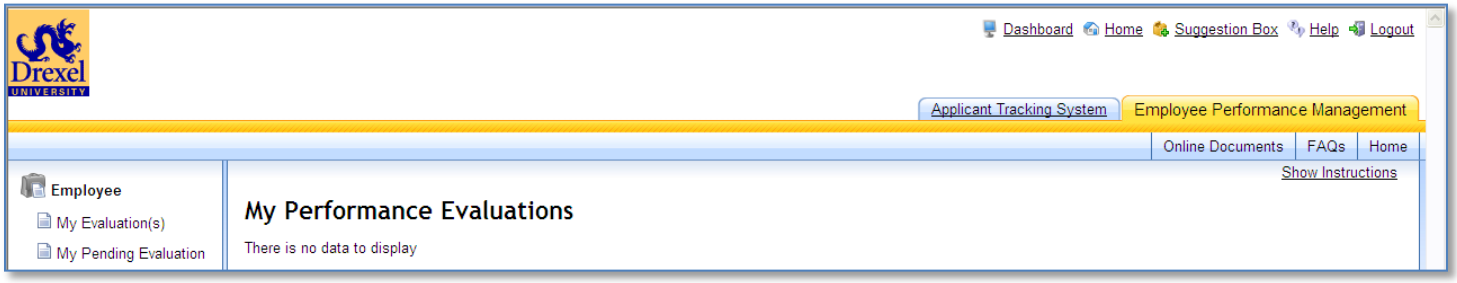
Before you can start entering goals, your manager must first create an evaluation for you. Once your manager kicks off your evaluation, you will receive an email stating that your evaluation has been created. You will also receive an email stating that they are an evaluator on a new evaluation. This means that you will be required to complete a self assessment on the newly created evaluation.

You will know that your manager has kicked off your evaluation if:

1) You receive the emails listed above
2) An evaluation loads when you select My Evaluations under the Employee Menu



If, when you select My Evaluations, you see the message, "There is no data to display," you manager has not yet kicked off your evaluation.

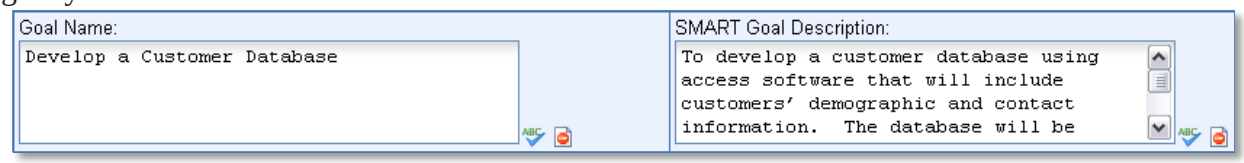


Determine and Enter SMART Goals

All goals should be written in the SMART goal format. We recommend that you and your manager determine three to five Performance Goals and one to two Development Goals per year. Your manager also has the ability to enter goals.

1) Select Employee Menu.
2) Select My Evaluations.
3) Add Performance Goals and Development Goals by inputting a Goal Name and SMART Goal Description for each goal. You must enter both a Goal Name and SMART Goal Description for each

goal you enter.



4) Select the Save button at the bottom of the screen after you finish entering goals on each tab.
5) Select per goal if you wish to add notes at this time.
6) Select the Overall Evaluation of Performance tab to review the evaluation rating definitions for goals, competencies, and overall performance.

Evaluation Scale Information: (Evaluation Rating Scale)

Did Not Achieve Results	Partially Achieved Expected Results	Fully Achieved Expected Results	Achieved More Than Expected Results	Exceptional Achievement
Goals: Results did not meet expectations regarding this goal.	**Goals:** Results met some, but not all, expectations regarding this goal.	**Goals:** Results met all expectations regarding this goal. (GOOD SOLID PERFORMANCE)	**Goals:** Results exceeded most performance expectations regarding this goal.	**Goals:** Results exceeded all performance expectations regarding this goal.
Competencies: Did not demonstrate this competency at the expected level.	**Competencies:** Inconsistently demonstrated this competency at the expected level. Sometimes required assistance or direction from others.	**Competencies:** Consistently demonstrated this competency at the expected level without assistance or direction from others.	**Competencies:** Consistently demonstrated this competency at a high level. May have been viewed as a role model and clearly stood out among peers relative to this competency.	**Competencies:** Always demonstrated this competency at a superior level. Functioned as an internal expert across Drexel University with this competency, teaching or coaching others, in addition to serving as a role model.
Overall Rating: Results did not meet most objectives and/or did not demonstrate competencies at the expected level.	**Overall Rating:** Achieved some but not all objectives and/or inconsistently demonstrated competencies at the expected level.	**Overall Rating:** Results met all objectives (and may have exceeded some objectives), and demonstrated all competencies at the expected level. (GOOD SOLID PERFORMANCE)	**Overall Rating:** Results exceeded most objectives, and demonstrated all competencies at a high level.	**Overall Rating:** Results exceeded all objectives, and demonstrated all competencies at a superior level. Contributions to the department/organization were exceptional during this performance cycle.

Performance Goals

Performance goals are the "what" you are working to accomplish. They are tied to departmental and/or organizational strategic priorities. Below is an example of a performance goal:

Billing Management

- Implement an enhanced billing management process through web based technology by 9/30/08.
- Develop a master design document, and creating stakeholder buy-in and awareness.
- Ensure functionality of system and new form.
- Develop the communication and implementation plan for the new process by the end of September.
- Ready for delivery in mid-October.

Development Goals

Development goals focus on areas you want to develop in order to grow in your job or advance in your career. Below is an example of a development goal:

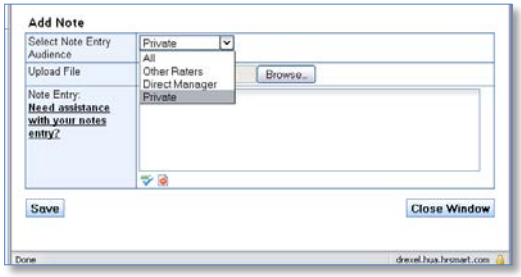
Public Speaking

To increase my effectiveness in giving presentations I will join Toastmasters by March 31 and attend at least 6 monthly meetings by the end of the year. I will ask Ted Thomas to provide feedback using the Toastmasters format on my presentations after each staff meeting during the year.

Enter Notes About Your Performance

Throughout the year you should document your performance by using the notepad feature. You might want to set quarterly reminders for yourself to review your goals and competencies and take note on how you have been performing.

1) Select Employee Menu.
2) Select My Evaluations.
3) Complete the following steps for each of the goals/competencies you want to write a note for:
    a) Select in the Actions column.
    b) Select the Note Entry Audience under the Add Note heading. Select from Private or All:
        i. Private: only viewable to the user who inserts the note.
        ii. All: viewable to any user.



    c) Enter the performance notes in the Note Entry field.
    d) Select Save.

If you want to document your performance but aren't sure how to word your note, you can select the "Need Assistance with your notes entry?" link in the Note Entry field. This will start a wizard that asks you a series of questions that prompts you to write your note.

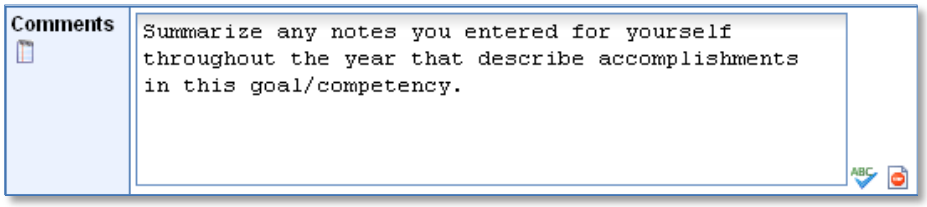
Your Manager Will Move Your Evaluation into the Assessment Phase

In October, your manager will move your evaluation into the Assessment phase. Once the evaluation is in the Assessment phase, you should complete a self assessment and then your manager will assess their performance. Once your manager has moved the evaluation into the Assessment phase, you will receive a system generated email that says you can begin your self assessment.

Complete Your Self Assessment and Submit Assessment to Your Manager

You will want to verify the deadline for your self assessment with your manager. ***Your manager will not be able to evaluate your performance until after you have completed your self assessment and submit the evaluation to him/her.***

1) Select Employee Menu.
2) Select My Evaluations.
3) Complete the following steps for each of your employee's Performance Goals, Competencies, and Development Goals:
    a) Select to review all notes entered by you and your manager throughout the year.
    b) When finished, close the notepad.
    c) Select the Evaluate button.
    d) Enter comments describing the accomplishment of the goal or demonstration of the competency in the Comments field. This comment should summarize any notes you entered for yourself throughout the year. (*All Comments will be viewable to all users.*)



    e) Using the scale provided, select a rating and then select the Evaluate button.
4) Once you are finished rating all of your goals and competencies, select the Overall Evaluation of Performance tab.
5) Review all of the ratings you gave yourself.
6) Select the Submit Evaluation button to submit the evaluation to your manager. ***Your manager will not have access to evaluate your performance until you submit this button.***

Your Manager Will Evaluate Your Performance

Once you select the Submit Assessment button, your manager will receive a system generated email stating that he/she can begin evaluating your performance. You will not be able to see any of your manager's ratings until he/she pushes your evaluation into the Review phase.

Your Manager Will Give You A Copy of the Evaluation to Review

Before you meet with your manager, he/she should give you a copy of the evaluation to read thoroughly so you can take note of any questions they may have for your manager. Allowing you to review the evaluation prior to your conversation allows you to fully digest your managers comments and enter the conversation with a full knowledge of what is going to be discussed so there aren't any surprises.

Discuss the Evaluation With Your Manager

Your manager should schedule time with you to discuss your evaluation in full.

Your Manager Will Revise the Evaluation as Needed

After meeting with you, it is possible that your manager will want to revise some of the ratings.

Your Manager Will Have Your Department / Division Review and Approve the Evaluation, if applicable

Some departments/divisions require a higher level of approval above the manager. If your department requires this, your manager will contact your department administrator once you and your manager are finished reviewing the evaluation. Your department administrator should let your manager know once the evaluation has been approved and is ready to be moved to the Review phase for signatures.

Your Manager Will Revise the Evaluation as Needed (After Department / Division Approval)

If your department/division required a higher level of approval, it is possible that revisions to the evaluation were requested. Your manager will review this with you and make these revisions at this time.

Your Manager Will Move the Evaluation to the Review Phase

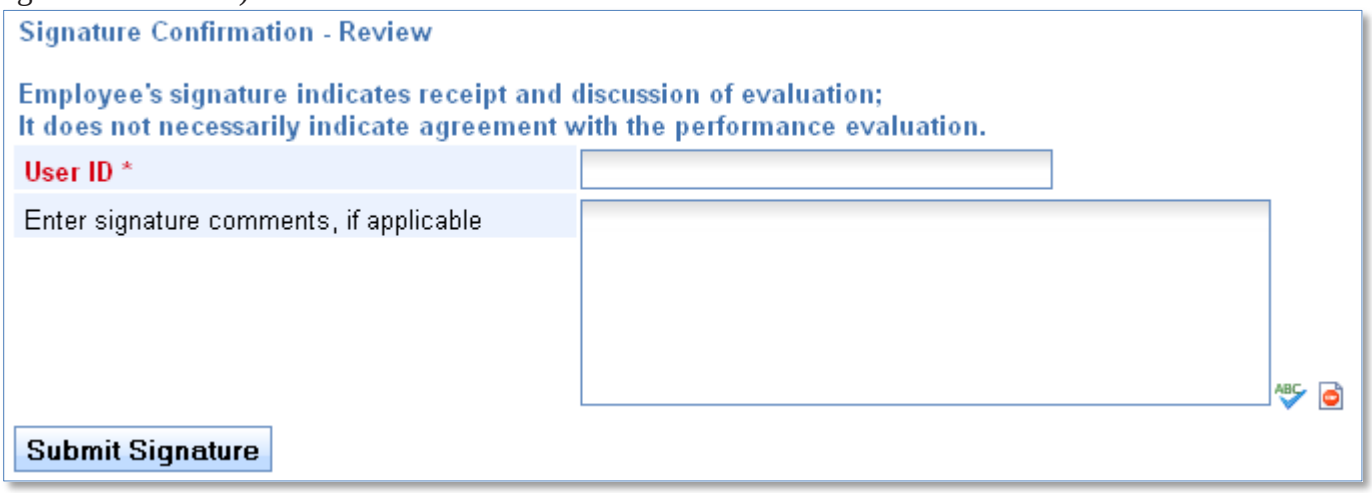
Once you and your manager have discussed the evaluation and the evaluation has received approval from your department/division (if applicable), your manager can move the evaluation into the Review phase for signatures.

Once your manager moves your evaluation into the Review phase, you and your manager will receive a system generated email that says you can now sign the evaluation.

Employee and Manager Review and Sign the Evaluation

Once the evaluation is in the review stage, both you and your manager should review the final evaluation and then sign the evaluation. If you refuse to sign the evaluation, your manager will explain that a signature only indicates that you have reviewed the performance evaluation with your manager. You are free to write any comments you would like in the space provided. You will not be eligible for a potential merit increase unless you have signed the evaluation.

1) Select Employee Menu.
2) Select My Evaluations.
3) Double check the ratings that you assigned to each goal/competency.
4) Select the Overall Evaluation of Performance tab.
5) Scroll all of the way to the bottom of the page and enter your user ID (the same user ID that you used to log into DrexelOne).



6) Enter any final comments in the Enter signature comments field.
7) Select the Submit Signature button.

Once both signatures are received, the evaluation is considered complete and is automatically submitted to Human Resources.

Human Resources Moves Completed Evaluation into Your My Past Evaluations

Once the performance evaluation cycle is complete, Human Resources will close all completed performance evaluations. When the evaluation is closed, the evaluation will be available to your employee in the My Past Evaluations screen for the duration of their employment at Drexel University.

Accessing your previous year's evaluations

1) Select Employee Menu.
2) Select My Past Evaluations.
3) Select or in the Actions column to view previous evaluations.

Appendix

- Performance Evaluation Process Overview
- Employee Quick Reference Guide
- Performance Management Hands-On Training

Troubleshooting

Visit the HR website for solutions to commonly asked questions.