Manager Step-by-Step Guide for Performance Evaluations

Step	Due By	Page
Create an evaluation for your employee	July	2
Determine and enter SMART goals • Performance Goals • Development Goals	July	2
Enter notes about your employee's performance	April	3
Move employee's evaluation into the Assessment phase	April	4
Have your employee complete his/her self assessment and submit the evaluation to you	May	4
Evaluate your employee	May	4
Give your employee a copy of the evaluation to review	Mid-May	5
Discuss the evaluation with your employee	Mid-May	6
Revise the evaluation as needed (after discussion with employee)	Mid-May	6
Have your department/division review and approve the evaluation, if applicable	End of May	6
Revise the evaluation as needed (after department/division approval)	End of May	6
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

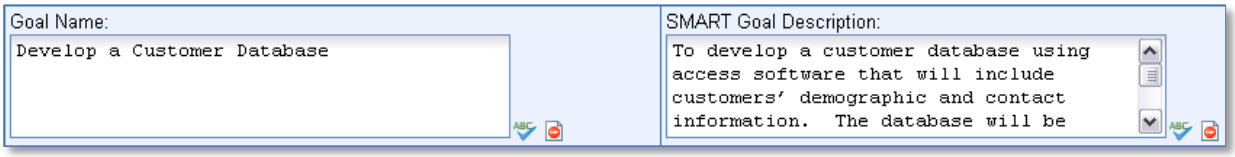
Before you can start entering goals for your employee, you must first create an evaluation for your employee.

1) Select Manager Menu.
2) Select My Employee Evaluations.
3) Select under the Actions column next to your employee's name.
4) Select the Create This Evaluation button. (*Once you select this button, both you and your employee will receive an email stating that an evaluation has been created. Your employee will also receive an email stating that they are an evaluator on a new evaluation. This means that they will be required to complete a self assessment on the newly created evaluation.)*

Determine and Enter SMART Goals

All goals should be written in the SMART goal format. We recommend that you create three to five Performance Goals and one to two Development Goals per year for your employee. Your employee also has the ability to enter goals. If you would like for your employee to enter the goals in his/her evaluation, you will only need to review these goals at this time.

1) Select Manager Menu.
2) Select My Employee Evaluations.
3) Select in the Planning phase column, per employee.
4) 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.



5) Select the Save button at the bottom of the screen after you finish entering goals on each tab.
6) Select per goal if you wish to add notes at this time.
7) 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:

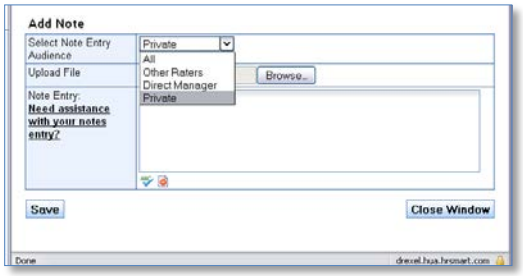
Public Speaking

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 EMPLOYEE'S PERFORMANCE

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

1) Select Manager Menu.
2) Select My Employee Evaluations.
3) Select to view the evaluation.
4) 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 employee's 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.

Move Employee's Evaluation into the Assessment Phase

In October, you will move your employee's evaluation into the Assessment phase. Once the evaluation is in the Assessment phase, your employee should complete a self assessment and then you will assess their performance.

1) Select Manager Menu.
2) Select My Employee Evaluations.
3) In the Actions column, select per employee.

You will know that the evaluation was moved from the Planning phase to the Assessment phase when you see icons in the Assessment phase column. Once you move the evaluation into the Assessment phase, your employee will receive a system generated email that says he/she can begin his/her self assessment.

Employee Completes Self Assessment; Submits Assessment to Manager

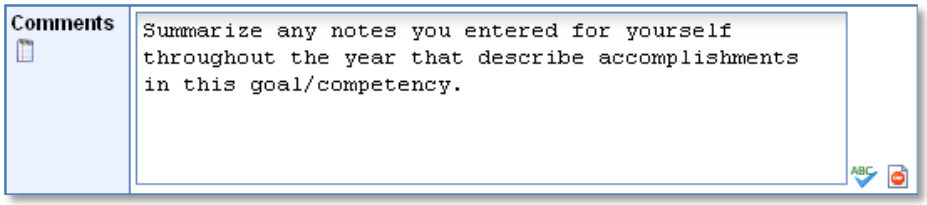
Your employee will go through all of his/her goals and competencies and review his/her and your notes from throughout the year. Once they have reviewed the notepad, he/she will select the Evaluate button under the Self Assessment column for each goal and competency, summarize his/her own notes in the Comments box, and then select a rating for that goal/competency.

Once he/she is finished writing comments and have selected a rating, he/she will select the Evaluate button. Your employee will evaluate him/herself on all goals and competencies. Once he/she is finished evaluating him/herself, he/she will go to the Overall Evaluation of Performance tab and select the Submit Assessment button. ***You will not have access to evaluate your employee until he/she selects the Submit Assessment button.***

Evaluate Your Employee

Once your employee selects the Submit Assessment button, you will receive a system generated email stating that you can begin evaluating his/her performance.

1) Select Manager Menu.
2) Select My Employee Evaluations.
3) Select to view the evaluation.
4) 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 employee 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.

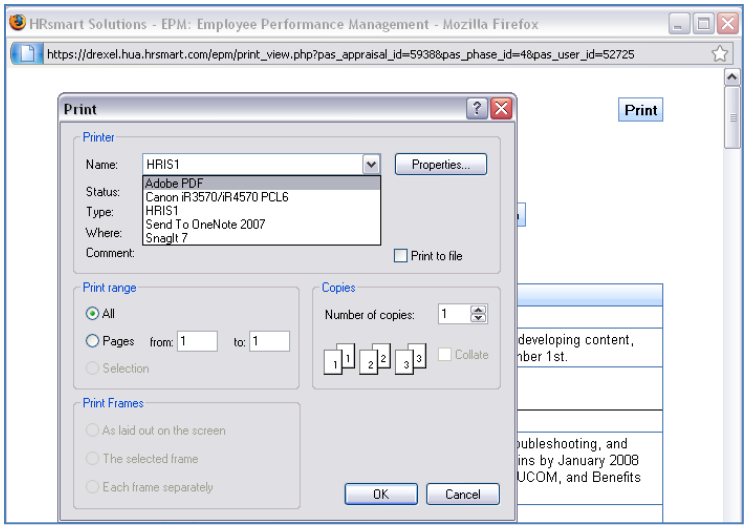
5) Once you are finished rating all of the employee's goals and competencies, select the Overall Evaluation of Performance tab.
6) Select an Overall Rating from the scale provided.
7) Select the Submit Evaluation button. By selecting Submit Assessment, you aren't submitting the evaluation to Human Resources. Rather, you are locking in the ratings that you gave your employee.

Give Your Employee a Copy of the Evaluation to Review

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

1. Select Manager Menu.
2. Select My Employee Evaluations.
3. Select to to view the print preview of the evaluation.
4. Select the Go button at the top of the screen to insert all comments into the evaluation.

5. Select the Print button at the top right corner of the screen. You can either print to a PDF or to paper. To print to PDF, select Adobe PDF from the printer Name drop down menu.



Discuss the Evaluation With Your Employee

You should schedule time with your employee to discuss his/her evaluation in full.

Revise the Evaluation as Needed

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

1) Select Manager Menu.
2) Select My Employee Evaluations.
3) Select in the Actions column to push the evaluation back to the Planning phase.
4) Once the evaluation is pushed back to the Planning phase, select in the Actions column to push the evaluation forward to the Assessment phase.
5) Have your employee log into the evaluation software and complete the following instructions:
    a. Go to the Overall Evaluation of Performance tab.
    b. Select the Submit Assessment button.

Once your employee submits the evaluation back to you, you can edit the goal/competency ratings and/or the overall evaluation rating. When you are finished revising the evaluation, go to the Overall Evaluation of Performance tab, select an overall rating, and select the Submit Assessment button.

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, make sure you contact your department administrator once you are finished reviewing the evaluation with your employee. Your department administrator should let you know once the evaluation has been approved and is ready to be moved to the Review phase for signatures.

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.

1) Select Manager Menu.
2) Select My Employee Evaluations.
3) Select in the Actions column to push the evaluation back to the Planning phase.
4) Once the evaluation is pushed back to the Planning phase, select in the Actions column to push the evaluation forward to the Assessment phase.
5) Have your employee log into the evaluation software and complete the following instructions:
    a. Go to the Overall Evaluation of Performance tab.
    b. Select the Submit Assessment button.

Once your employee submits the evaluation back to you, you can edit the goal/competency ratings and/or the overall evaluation rating. When you are finished revising the evaluation, go to the Overall Evaluation of Performance tab, select an overall rating, and select the Submit Assessment button.

Move the Evaluation to the Review Phase

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

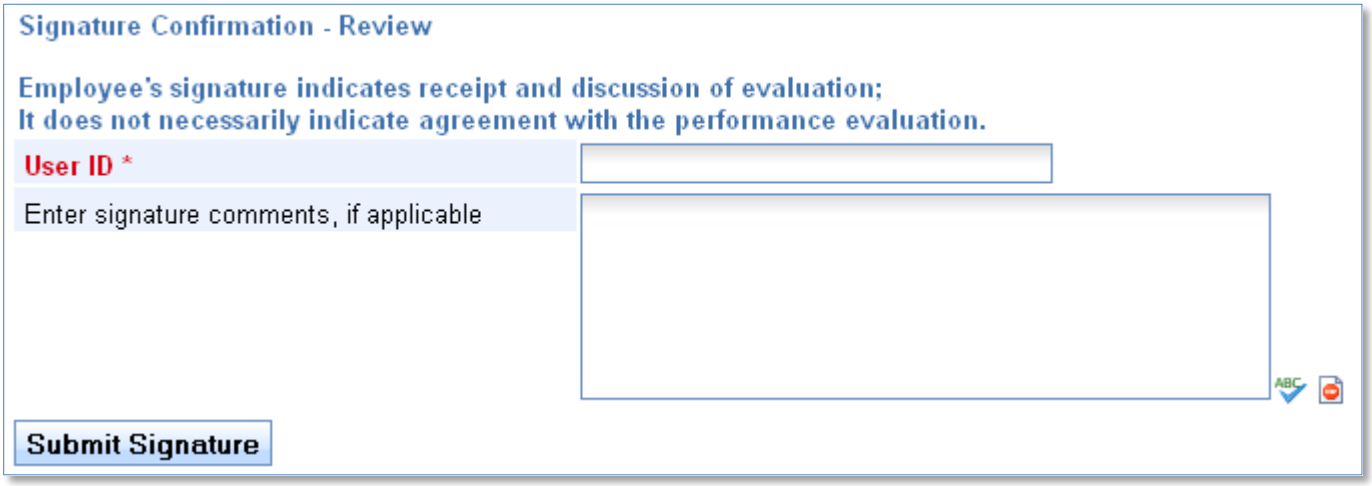
1) Select Manager Menu.
2) Select My Employee Evaluations.
3) In the Actions column, select per employee.

You will know that the evaluation was moved from the Assessment phase to the Review phase when you see icons in the Review phase column. Once you move the evaluation into the Review phase, you and your employee 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 the employee and manager should review the final evaluation and then sign the evaluation. If your employee refuses to sign the evaluation, explain that a signature only indicates that your employee has reviewed the performance evaluation with his/her manager. Inform your employee that he/she is free to write any comments he/she would like in the space provided. An employee will not be eligible for a potential merit increase unless he/she has signed the evaluation.

1) Select Manager Menu.
2) Select My Employee Evaluations.
3) Select to view the evaluation.
4) Double check the ratings that you assigned to each goal/competency.
5) Select the Overall Evaluation of Performance tab.
6) 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).



7) Enter any final comments in the Enter signature comments field.
8) 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 Employee's 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 previous year's evaluations for your employee

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

Appendix

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

Troubleshooting

Visit the HR website for solutions to commonly asked questions.