Performance Management System

Performance Evaluation - Supervisor

Job Aid
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Accessing Direct Report’s Evaluation

Please be advised that the document 2015 Staff Performance Evaluation for Felicia Ford is now available in your PerformanceManager Inbox folder for your approval.

This document was last with Felicia Ford and is due on 03/01/2016. Comments from Felicia Ford are:

You can access this document at the following URL:
Document Link

Please do not reply to this message. For assistance, or if you have any questions, please contact Human Resources at hrecopt@ku.edu or 785-864-4946.

Log in to mytalent.ku.edu using your KU online ID and password.

In addition to the notification email, the evaluation will show up in the supervisor’s “To Do” on their home page. The supervisor can click on “Manager fills out employees performance rating and comments” to complete the evaluation for their employee.

When a supervisor’s direct report has completed their self-evaluation, the supervisor will receive a notification email.
The performance evaluation form for the supervisor’s direct report can also be accessed by clicking on “Home” and then clicking on “Performance”.

Clicking on “Performance” takes the supervisor to their Performance Inbox. Forms needing action will show up in the Inbox.

1. Due dates for the form are displayed in the inbox.
2. The inbox defaults to showing “All” but the supervisor can narrow down the display by clicking, “My Direct Reports” to show only their direct reports.
3. To access the form, click on the form title.

The supervisor should scroll down in the performance evaluation to get to the goals.
Evaluating Goals

Click anywhere on the goal window for more details to appear to include “Goal Details” and “Other Details”.

<table>
<thead>
<tr>
<th>1</th>
<th>Goal name and measure of success</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Other’s Rating (the employee’s self-evaluation rating)</td>
</tr>
<tr>
<td>3</td>
<td>Click on “Goal Details”</td>
</tr>
</tbody>
</table>

1. Under “Goal Details”, additional details about the goal appear to include name, description, measure of success, start date due date, percentage complete and status.

2. Click on “Other Details”.

<table>
<thead>
<tr>
<th>Goal</th>
<th>Goal Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal Name</td>
<td>Goal Name</td>
</tr>
<tr>
<td>Goal Description</td>
<td>Goal Description</td>
</tr>
<tr>
<td>Measure of Success, Supervisor Edit, Employee Edit</td>
<td>Measure of Success, Supervisor Edit, Employee Edit</td>
</tr>
<tr>
<td>Start Date</td>
<td>01/01/2015</td>
</tr>
<tr>
<td>Due Date</td>
<td>11/05/2015</td>
</tr>
<tr>
<td>Complete</td>
<td>75.0%</td>
</tr>
<tr>
<td>Status</td>
<td>On Target</td>
</tr>
</tbody>
</table>
Under “Other Details”, “Tasks” and “Progress Updates” appear.

Supervisors have the opportunity to edit the employee’s goals before providing a rating by clicking “Edit”. 
From here, the supervisor can make any necessary edits, provide progress updates, change the completion status, and change the percentage. Once changes have been made, the supervisor should click, “Save Changes”.

Once the edits have been made to the goal, the rating can be selected by clicking on the drop down arrow next to “Please Select”.
The supervisor should select from the ratings provided.

For definitions of what the performance ratings mean, the supervisor can click on the question mark next to “Rating” and a drop down will appear defining the ratings.

Once a rating has been selected, the supervisor is required to provide comments. Supervisors should use the space provided to type their comments.
The supervisor can format the text in the comments section by using the icons displayed.

The supervisor can click “Spell Check” to perform spell check of the text fields they have completed.

The supervisor can click “Legal Scan” to have the language used scanned and reviewed for suggested changes.
Evaluating Competencies

Once the supervisor has provided a rating and comments on the employee’s goals, the supervisor should provide a rating and comments for each of the nine University Core Competencies. The supervisor can view the rating and comments provided by the employee.

To select a rating, the supervisor can click on the drop down next to “Please Select”.

Select from the ratings listed.
Once a rating has been selected, the supervisor is required to provide comments.

Supervisors can create their own comments, or they can get assistance from the Writing Assistant and edit as desired. To use the Writing Assistant click on the Writing Assistant button.

Three columns are shown, “Improve”, “Meets”, and “Exceeds” with statements under each briefly describing performance.
When a statement is selected, detailed comments are provided in the “Preview Quote Below” space.

By clicking “Place Quote” the quote will become part of the comments on the evaluation form. Multiple quotes can be selected and added to the comments by clicking “Place Quote”.

The quotes default to third person and place the employee’s name in the quotes. To change the language to “You” instead of the employee’s name, click on the toggle under “Select Narrative”.
Once all quotes have been added, the supervisor can click “Cancel” to return to the evaluation form.

The comments selected from the Writing Assistant display in the text box. Changes can be made, and the formatting can be changed using the options available.

Evaluating Overall Performance

Once a rating and comments have been entered for all goals and competencies, an overall performance summary will be displayed. If the rating is still showing “Please Select” click save for the form to refresh.
Reviewing Gap Analysis

Supervisors can also review the difference between what the employee has rated themselves and how the supervisor rated the employee by clicking on the gap analysis.

Items are displayed that the supervisor rated higher than the employee rated themselves and the items that the supervisor rated lower than the employee rated themselves.

The supervisor should determine an overall performance rating and select the performance rating from the drop down.
The supervisor should type in comments in the “Overall Performance Comments” section.

Once a rating and comments have been entered for all competencies and goals, and a final rating and comments have been keyed, the supervisor can perform a legal scan and a spell check by clicking on “Actions”.

From “Actions” select “Spell Check” or “Legal Scan”.

Additionally, supervisors can perform the following functions:
1. Print the form by clicking on the print icon.
2. Save the form as a PDF by clicking on the PDF icon.
3. Save the form by clicking on the save icon.
Save and Close

Once the supervisor has selected a rating and provided comments for all goals and all competencies, if the supervisor does not yet want to send it to the employee, the supervisor can select “save and close” to save the form and exit the form.

Send to Previous Step

The supervisor also has the option to “Send to Previous Step”. In the event the employee wants to make changes to their self-evaluation, the supervisor can “Send to Previous Step”. If this step is performed, the employee can make changes, and all of the changes the supervisor made on the performance evaluation will be saved but not visible to the employee when sent to the previous step.

Send to Employee Acknowledgement

When the supervisor has made all changes necessary, the supervisor can click “send to Employee Acknowledgement” to send the form to the employee to review. Before doing so, the supervisor should meet with the employee to review the performance evaluation.

To confirm that they want to send the form to the employee, the supervisor should click “Send to Employee Acknowledgement”. The supervisor also has the option to go back to the form and make changes by clicking “Cancel and return to form”. The supervisor should speak with the employee to review the form in person before sending to employee for the employee to acknowledge.
Once the form has been sent to the employee, the form will no longer be in the supervisor’s inbox. The supervisor can still view the form by clicking on “En Route”.

Once the employee has acknowledged their performance evaluation, the supervisor will receive an email notification and the form will show up in the supervisor’s “To Do”. The supervisor can click on the form from their “To Do” box.

The supervisor can also access their employee’s performance form by clicking on the drop down menu and selecting “Performance”.

From the Inbox, the supervisor can click on the title of the employee’s evaluation form.
The supervisor can scroll all the way to the bottom to view the employee’s acknowledgement as well as any final comments.

The supervisor then has the option to provide any final comments to the employee.

Once final comments have been provided, the supervisor can click “Acknowledge and send to complete” to complete the form.

The supervisor will confirm sending the form to completion by clicking “Acknowledge and send to complete”. The supervisor also has the option to go back to the form by clicking “cancel and return to form”
Once the form is complete, the form will move to the supervisor’s and the employee’s “Completed” folder in the performance inbox.

Team Rater

If a supervisor has more than two direct reports, the “team rater” function can be helpful in evaluating Competencies for multiple employees at once. To access Team Rather click on “Performance” from the “Home” drop down.

In the Performance Inbox, the supervisor can click on “Team Overview”
The supervisor can view the progress of all of the employees that report to them. If there are check marks for all employees in the self-evaluation column, the team rater function will work best.

Click on “team rater”
Here, the supervisor will see the employee’s that report to them along the top and the nine university core competencies on the left hand side. The supervisor can select the rating for each competency for each employee by clicking on the boxes. The rating appears when the supervisor hovers over the box.

Comments can be typed in by clicking on the quote bubble.

The writing assistant can also be used from the team rater.
Be sure to click “save” before clicking away from this screen.