MANAGER ROLE

Note: Your screen displays may differ slightly from the ones shown in this tutorial.

Legend:

Blue rectangle callouts indicate instructions to user

Orange rounded rectangle callouts indicate information for user

Red boxes draw attention to item inside

The 2019 appraisals are displayed for this tutorial; you will complete the instructions for whatever is the current year period.
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STEP ONE: Opening the appraisal. The 2019 appraisals are displayed for this tutorial; complete the instructions for whatever is the current year period.

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A quick overview. Stacked tasks will open only after the previous task is complete.

1. Instructions for employee, supervisor, or both.
2. Box indicates step you are in.
3. Open circle means this step not yet complete.
4. Closed circle means this step is complete.

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Click “Get Started” to begin the review.

**At your request, the employee can enter a self-evaluation during the first week of the appraisal process.** Otherwise, it is optional. After reviewing the self-evaluation inputs, click Save and Continue to enter your ratings for this employee.

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To add a co-planner.

Note: If you wish to designate a co-planner for the appraisal, email HRtraining@shsu.edu, subject “Please add Co-planner.” Co-planners can perform reviews as though they were the manager assigned the task. This can be useful for managers to delegate appraisals for certain review tasks.
Step Two: Completing Appraisal Factors.

Click the drop down arrow to select the rating. Enter comments in the fields provided.

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Complete all required rating factors and any comments. Items designated with a red asterisk are required.

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**Step Three: Add developmental goals for the year.** You may add goals, or Save and Continue to go to the next step.

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Title *

Develop strategic plan

Description

Create the strategic plan for your team.

Due Date *

3/31/2020

Tasks

Add Tasks

Attachments

Choose File

Upload up to 3 attachments. Maximum upload 1mb

Click Save to save the goal.

Add tasks to complete the goal if desired.

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Select the Overall Rating.

Click Submit to save the rating.
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**Note:** The overall rating will only display after you return to conduct and acknowledge the review meeting. This is to prevent the reviewee from seeing the rating prior to the review meeting.

Click **Submit** again to save the review.
Manager review is complete. Return to Scheduled Tasks to conduct the Review Meeting with your employee when you are ready.

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You may print the appraisal to prepare for the review meeting by clicking the Options down arrow.

ARRANGE THE REVIEW MEETING WITH YOUR EMPLOYEE.

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Step Four. Conduct and acknowledge the Review Meeting. After you conduct the review meeting with the employee, you will return to the appraisal to acknowledge the review meeting by clicking on Home>Scheduled tasks.

Click Scheduled Tasks.

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Select the employee’s appraisal.

This is the due date for this step (acknowledge review meeting).
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Areas for Improvement
Please highlight the employee's areas for improvement in the section provided. Provide short, bullet-style comments for discussion during the employee conference.

Comments:

- Needs to learn to expect the unexpected.

Click Save and Continue to move to next step.
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Note: While the Overall Rating may still be adjusted at this point, prior to the supervisor signing off the review meeting any changes should be reviewed with the employee prior to the supervisor’s signature.

Overall Rating now displays. May still be adjusted at this point using pull down arrow.

Click Save and Continue to move to next step.

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Note: You may Redo the date prior to submitting if it has changed since you originally completed the acknowledgment.
Note: The employee will be able to see the entire appraisal once you click Submit. This will trigger an email that will notify the employee to acknowledge receipt of the appraisal in Talent Management. The appraisal is not complete until the employee acknowledges the receipt.

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Return to **Home>Scheduled Tasks** to complete any other employee appraisals assigned to you.

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Note: You can see the progress of appraisals requiring your action from here. Due dates may vary depending on the step you are in for the appraisal and the date of completion of the previous step for the appraisal. Click “Show Completed and Expired Tasks” to display all reviews.

This panel shows YOUR completion status, not the employee’s.

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Note: Your employee must acknowledge the appraisal for the appraisal to be considered complete. You will receive notification via email when the employee completes the acknowledgement step. You may also return to the appraisal to see if the employee has completed the step (Home>Scheduled Tasks>Click appraisal).

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You may print a copy of the appraisal for your records by clicking on **Options** in the upper right corner, but Talent Management will retain a permanent copy of the appraisal.

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