

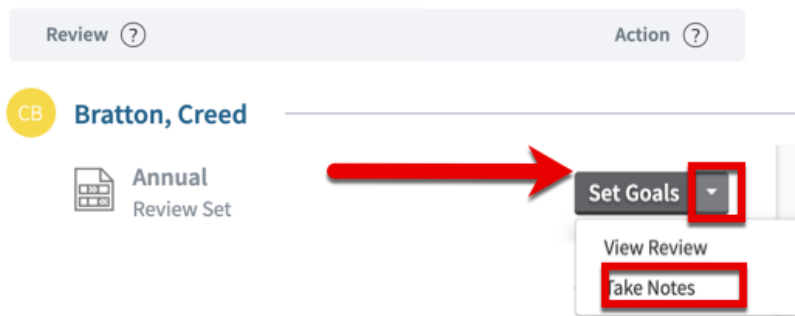
# Manager Guide

# Taking a Note on an Employee

## 1. Locate the Employee You Want to Take Notes On

Once you locate the employee from your list of Direct Reports, click on the drop down beside "Set Goals" and pick "Take Notes."

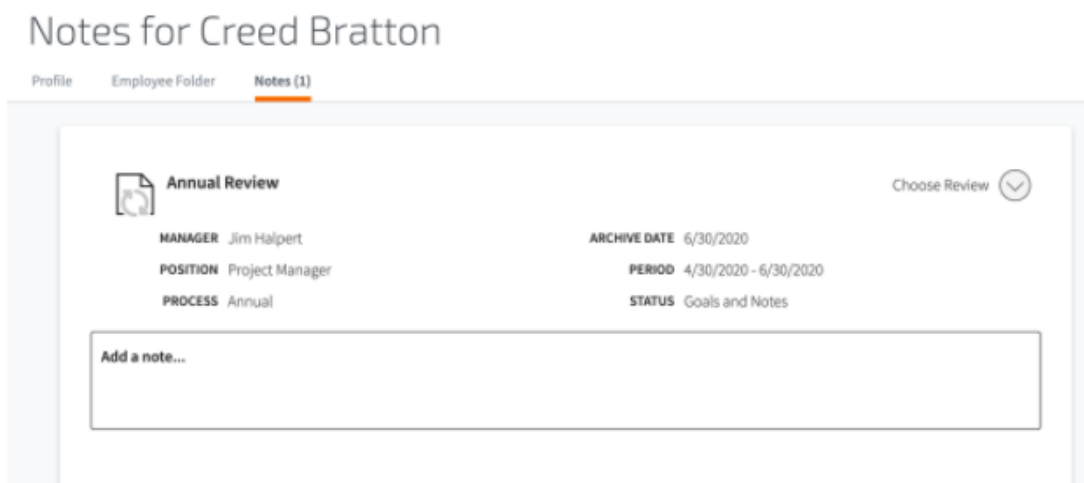
### Direct Reports (8)



If your organization has enabled notes on all employees, you may also see a group of other staff members at the bottom of your home page that you can take notes on. Just click the name of the employee you'd like to take a note on.

## 2. Input the Note

Enter your note text and select a privacy setting to determine if the note is visible to the employee or not. You also have the option to associate the note to a specific element from the review document, if one is not selected the note is categorized under General Notes. Make sure to select Add this Note to save.



# Add a Goal to an Employee's Review

## 1. Choose the Employee You Want to Add a Goal For

Under the 'Actions' column in your Direct Report list, click on the 'Set Goals' button. If the Employee's Review is in scoring, this button will say Score Review. You will need to select to 'Goals and Notes' tab in the timeline of the Employee's Review Hub.



## 2. Click Add a Goal

### Annual Review for Creed Bratton

**Position Description**

Position Project Manager description

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**Add a goal**

<b>Competencies - Values</b>	<b>50%</b>
<b>Initiative</b>	<b>20%</b>

## 3. Add an Existing Goal, or Create a New One

Enter the name of the goal and a description if desired. Save Goal when done.

## 4. Confirm the Location of the Goal

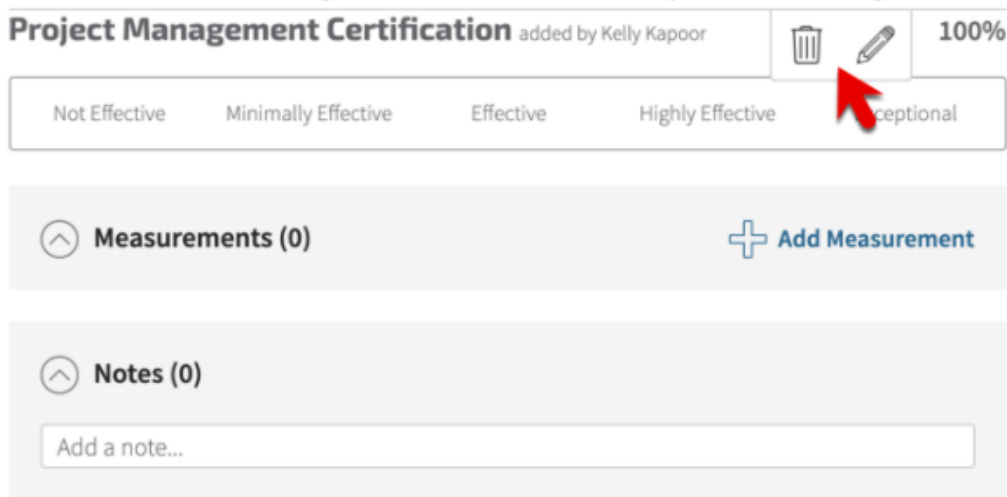
Click Insert Goal.

NOW, YOUR NEW GOAL SHOWS UP AS A LINE ITEM THAT WILL BE SCORED DURING YOUR EMPLOYEE'S EVALUATION

# Edit or Remove a Goal

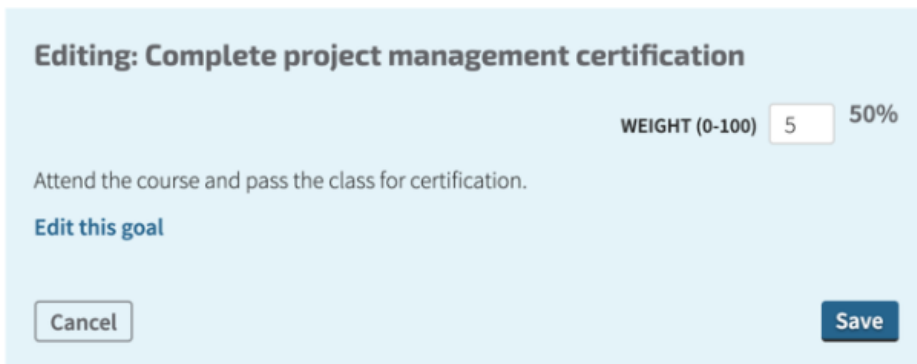
## 1. Hover Over the Goal

The **Trash Can** will remove the goal. The **Edit Pencil** will allow you to make changes.



## 2. Editing Your Goal

If **Edit** is selected, the content of the goal can be edited and the weight of the goal can be adjusted. Adjusting the weight of the goal will effect the weights of the other goals on the review.



PLEASE NOTE  
Only the author of the Goal has the ability to Edit that Goal. If the employee added a specific Goal, they will need to edit that Goal if necessary

# Add Measurements to an review

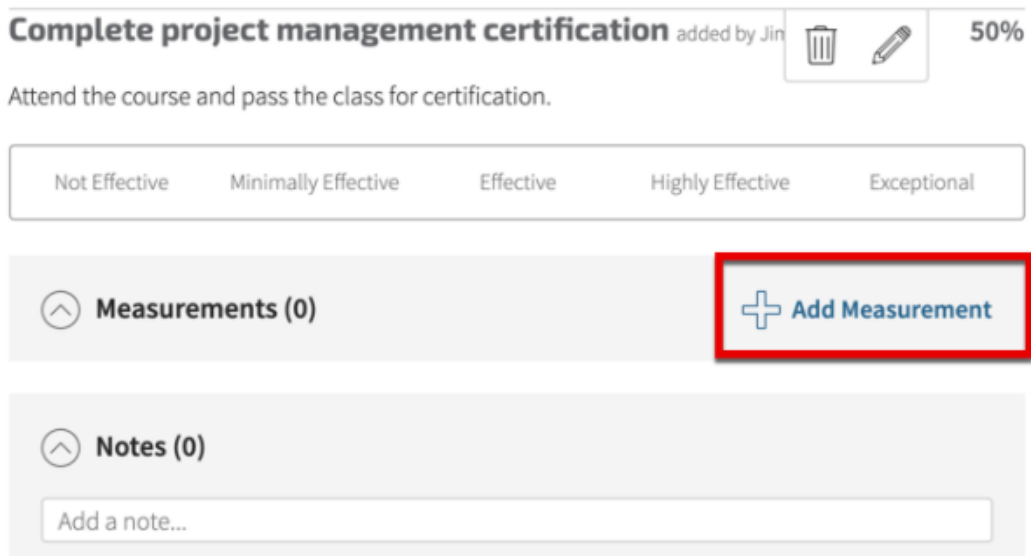
## 1. Locate the Employee Who You Want to Add a Measurement

If the Review is in scoring, this button will say "Score Review". Once the Employee's Review Hub, click on the "Goals and Notes" tab in the timeline.



## 2. Decide Where You Want to Add the Measurement

Measurements can be added to a competency or a goal. Click Add Measurement when you're ready to add a measurement.



### 3. Enter in the Measurement Details

Only the 'Measurement Title' is a required field. Finish by clicking Save.

**Project Management Certification** added by Kelly Kapoor 100%

Not Effective   Minimally Effective   Effective   Highly Effective   Exceptional

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Measurements (0) + Add Measurement

**MEASUREMENT TITLE**

**MEASUREMENT DESCRIPTION**  
B Bold I Italics U Underline ☰ Bullets ☰ Numbers 🔗 Link

**PERCENT COMPLETE**   **STATUS**  
 ▾    ▾

**STARTED**   **DUE**   **COMPLETED ON**  
     

✳️ **ALIGN TO STRATEGIC GOAL**  ▾

Add Email Reminder

Cancel Save

#### OPTIONAL

Keep yourself accountable with email reminders. Add an email reminder to your measurement by clicking 'Add Email Reminder'. You can then choose when you would like the email reminder to be sent, and to whom.

# Request 360-Rater Feedback

## 1. Select the Employee You Want 360-Rater Feedback on

In the Action column, click the drop-down arrow to the right of the 'Score Review' button. Select 'Manager 360-Raters' from the list. If you are already in the Employee's Review Hub, click on the 360-Rater Feedback tab in the timeline.



If you are already in the Employee's Review Hub, click on the 360-Rater Feedback tab in the timeline.



PLEASE NOTE

360-Rater Feedback is an optional step in the appraisal workshop.

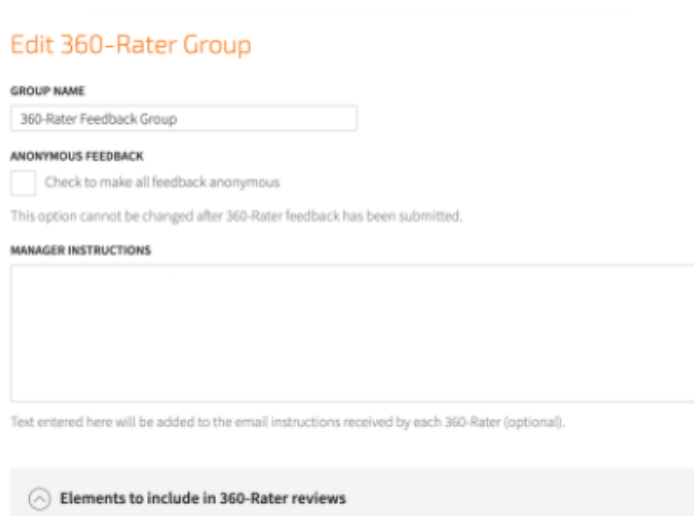
Organizations may, at the Administrative level, decide to not enable 360-Rater, which elements are scorable by 360-Raters, and/or if the feedback will be anonymous.

360-Rater feedback does not affect the overall review score. Ratings are not calculated into the final score.

### 3. Fill Out the Requested Information

On this page, you can fill out who you would like to Select as a 360-Rater, Add a 360-Rater, select the Elements to Include for 360-Raters to score, choose to make Feedback anonymous\*, and then click Save when you're complete.

\*360-Rater Feedback is always anonymous to the Employee. Checking the box to make Feedback anonymous, makes the feedback anonymous to the managers and administrators as well.




**Edit 360-Rater Group**

**GROUP NAME**  
360-Rater Feedback Group

**ANONYMOUS FEEDBACK**  
 Check to make all feedback anonymous  
This option cannot be changed after 360-Rater feedback has been submitted.

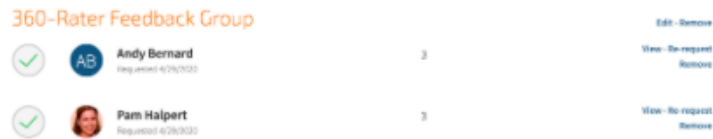
**MANAGER INSTRUCTIONS**  
  
Text entered here will be added to the email instructions received by each 360-Rater (optional).

 **Elements to include in 360-Rater reviews**



## 4. Manage the Feedback

You can manage the feedback that has been requested by selecting the 360-Rater Feedback tab from the timeline in the Review Hub at any time. Status indicators will show the progress of the 360-Raters that have been invited to provide feedback. Send a reminder to a 360-Rater if the request was issued but the 360-Rater has not responded. Delete a 360-Rater if desired.



### PLEASE NOTE

Your employee's review must be in Scoring in order to request 360-Rater Feedback. Please contact your site administrator with questions.

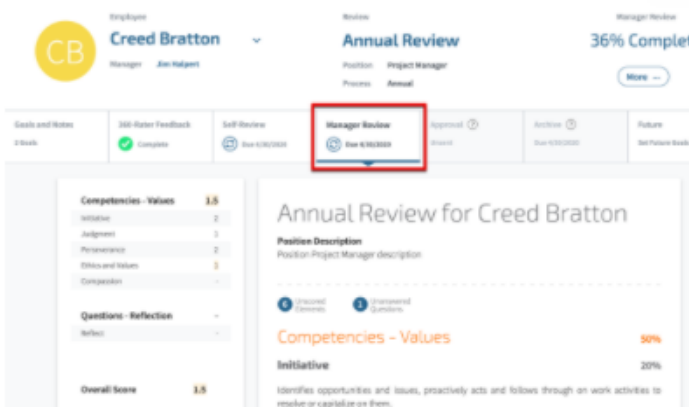
# Score an Employee's review

## 1. Locate the Employee You Want to Score

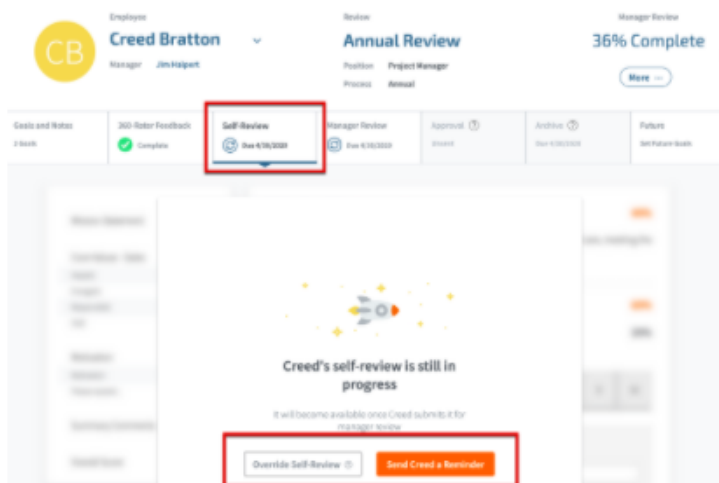
Select the employee you would like to Score by clicking on the 'Score Review' button.



By default, you will be in the 'Manager Review' tab within the timeline



You can see your progress on scoring the Employee's Review, as well as the employee's progress of their self-appraisal if applicable. You also have the ability to Override the self-review which will remove the request for the employee to complete it.



### 3. Select a Score for Each Competency

Use the Rating Scale bar to choose a score. You will also be able to see what the Employee rated themselves if they have already completed their self-review. You can also see any comments left. This is not- applicable if the Employee has not completed their self-review.

**Initiative** 20%

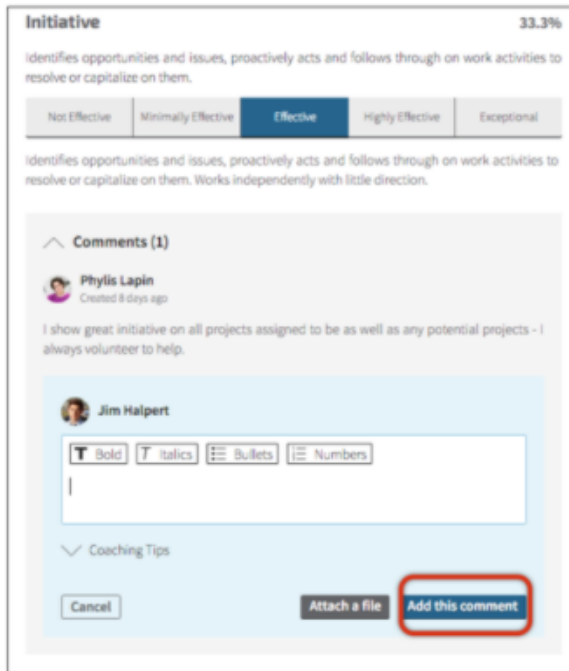
Identifies opportunities and issues, proactively acts and follows through on work activities to resolve or capitalize on them.

Not Effective	Minimally Effective	Effective	Highly Effective	Exceptional
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Identifies opportunities and issues, proactively acts and follows through on work activities to resolve or capitalize on them. Works independently with little direction.

## 4. Add a Comment if Desired

Save Comments by clicking "Add this Comment". Comments are optional and can include an attachment that will be linked with the review.

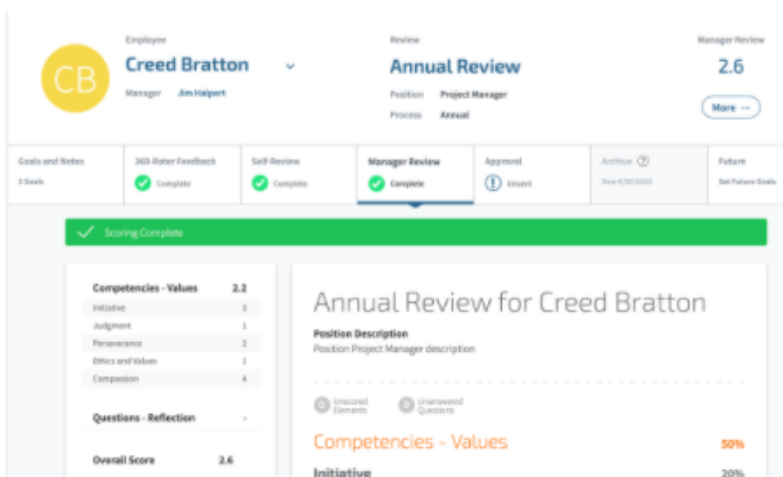


HELPFUL INFORMATION

Use the Coaching Tips to find comments a manager may use for the corresponding competency.

Click the "+" sign to copy them into the comments box.

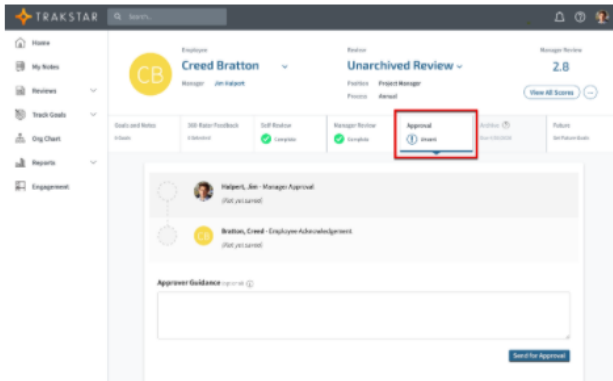
## 5. Scroll to the Top of the Review When Completed



# Send for Approval

## 1. Locate the Employee You Would Like to Send for

Click the Approval Tab from the Timeline



## 2. If applicable, Choose or View Who the Appraisal Will be Routed

This step can vary based on how your Administrators have created your Company's Appraisal process.

## 3. Leave Any Notes for Approvers

ALL Approvers will receive the message saved in this box as an email notification.

Approver Guidance (optional) ⓘ

## 4. Click the 'Send for Approval' button when you're ready

### HELPFUL INFORMATION

All approvers will see all submitted information, including employee, manager, and 360-rater feedback. Approvers can Approve/Reject Appraisals, as well as leave comments.

Utilize Cancel Approval option if you chose the wrong route for approval.

# Archive an review

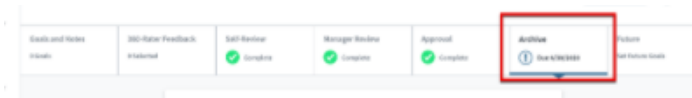
## 1. Locate the Employee You Are Ready to Archive

Click the 'Review & Archive' button. You can only archive an appraisal if all required steps are complete.



## 2. By default, this will take you to the 'Archive' tab in the Review Hub.

Click Archive Review to finalize Archival



## 3. Click Archive review to finalize Archival

Depending on the settings set by your administrator, all measurements and goals may carry over to the Employee's next review.

\*We recommend carrying goals forward if the Employee is still working on any of the objectives. They can be edited on the new Review.

