

# Staff Performance Appraisals: Completing and Viewing Staff Evaluations as a Manager

## Overview

This document will guide you through the overall process of completing staff performance evaluations, highlighting areas benefiting from additional instruction or detail.



**PLEASE READ**



### Notes

- This document includes a **one-page summary** of the process that includes enough information to get you started. Additional and more detailed process information follows.
- Some departments, such as the Police Department or Athletics, use a modified or different evaluation. While some of the details may be different, the mechanics are the same.
- Goals from 2022-23 are automatically pulled into the review process. New goals for 2023-24 will be added after the review process ends (more info to be provided later).
- Both the manager and employee sign off in Ignite to indicate that the performance discussion meeting took place. However, the manager must sign off first before the employee will be able to.



### Key Differences from Previous Years

- There is a new and optional method for entering and viewing reviews. It is called All-in-One and has advantages and disadvantages to the traditional way of entering and viewing reviews. Choosing to use it is a matter of personal preference.
- There is also new way to filter information to see the review progress of your direct and indirect reports (if applicable).

# Staff Performance Appraisals:

## Completing and Viewing Staff Evaluations as a Manager

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# Staff Performance Appraisals:

## Completing and Viewing Staff Evaluations as a Manager



### READ FIRST

This is a brief overview of navigation and process for evaluations. More details are available in the later sections. *NOTE: information on viewing where employees are in the process is available in the more detailed sections below.*

#### One Page Summary on Evaluations

Evaluation Process (Yellow steps shown below)

1	2	3	4	5
Employee completes and submits self-evaluation.	Manager completes the evaluation.	Manager shares completed evaluation with employee, and they meet to discuss.	Manager indicates performance review meeting was held.	Employee confirms performance review meeting was held.
(by March 20)	(by April 14)	(by April 28)	(by April 28)	(by April 28)

#### Navigation to Evaluation

1. My Team > Career and Performance > Evaluate Performance > 2022-23 Staff Performance Review

#### Completing the Evaluation

1. The document has several sections. Each section is completed separately and accessed through the **Edit** or **Evaluate** buttons.
  - **Document Details:** Ignore this section. It contains administrative details about the document.
  - **Ratings Summary:** This section shows the overall calculated rating from the other sections AND includes a comment section for you to complete. Provide a brief overview of the employee's overall performance including notable successes and challenges worth highlighting, especially ones not mentioned in other sections, as well as areas of strength and development for future career growth.
  - **Core Commitments:** This section uses both a drop-down ratings scale as well as a comments box for each of the six core commitments. Ratings are required and comments providing detail and context for the rating are recommended. Additionally, managers are expected to add comments if the highest or lowest ratings are selected.
  - **Job Performance:** This section also uses a rating scale and comment box.
  - **Performance Goals:** If the employee has entered performance goals in Ignite for the past year they will be included here. There is a comment section, but no rating. If the employee has not entered goals, there is no need to complete this section.
2. When finished you can print or save the document as PDF using the **Print** button. Click **Submit** on the same page to submit the evaluation. The final electronic versions of the document will be housed in Ignite.

#### Sharing the Evaluation with the Employee

1. Navigate to evaluation and open as described above. Click the **Share and Release** button, then **Submit**.

#### Indicating the Performance Discussion was Held

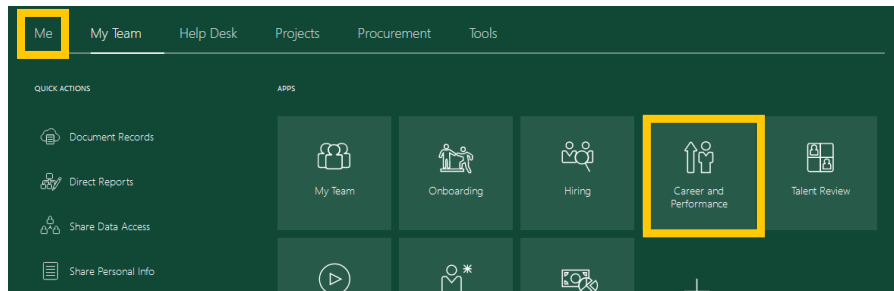
1. Navigate to evaluation and open as described above. Click the **Indicate Meeting Held** button, then enter the **Meeting Held Date**, and **Submit**. The employee also needs to confirm the meeting was held but cannot do so until *after* you have first indicated the meeting was held.

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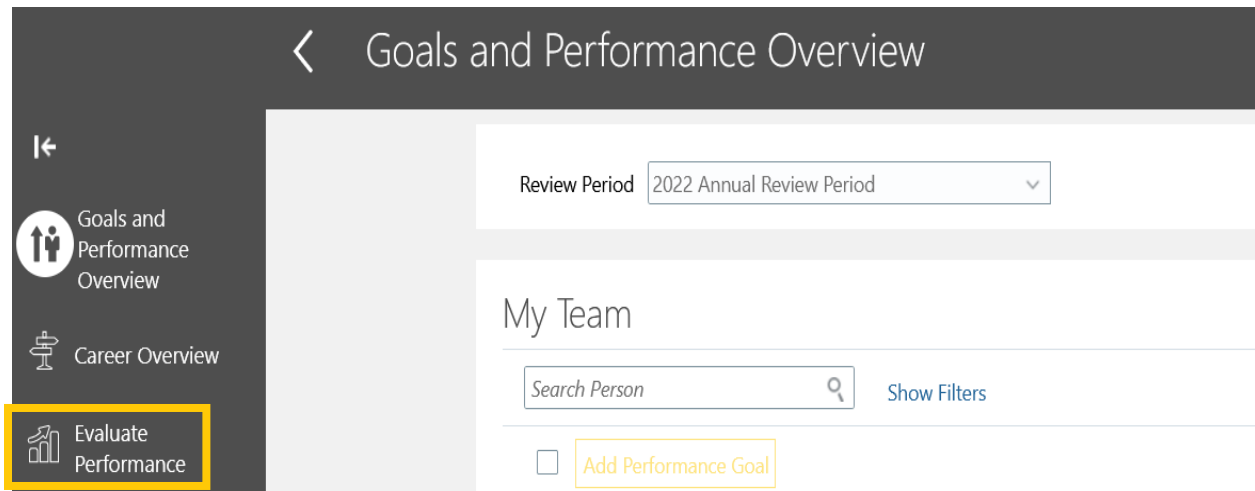
## Completing the Evaluation Process

### I. Navigating to and Opening the Evaluation

1. You can access the **Complete Manager Evaluation** task by selecting the **Career and Performance** tile under the **My Team** tab on the Ignite home page.



2. On the Goals and Performance Overview page, click **Evaluate Performance** on the left side of the screen.



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3. In the Performance Documents section, select the **2022-23 Staff Performance Review** link to open the evaluation. This page also shows which stages are complete with the green check mark, the current stage, and what needs to be completed, along with due dates. Additionally, the left side has numerous filter options and you can filter whether you see the reviews for just your direct reports or all who report up to you (if applicable).

## Performance Documents

The screenshot displays the 'Performance Documents' interface. On the left, there is a sidebar with a search bar containing 's41' and a 'Hide Filters' link. Below the search bar, there is a 'Saved Search' section with a dropdown menu set to 'ManagerViewFacetedSez' and a 'Save' button. Further down, there are 'Filters' with 'Expand All' and 'Collapse All' options, and a 'Document Type' section with 'Standard' (checked) and 'Anytime' (unchecked) options. The main content area shows a list of performance documents. The first document is '2022-23 Staff Performance Review' for 'Testuser\_Baylor\_s41', which is highlighted with a green box. Below this, there is a section titled 'All Tasks' with a list of tasks: 'Employee Completes Self-Evaluation | Due 03/20/2023' (marked with a green checkmark), 'Conduct Manager Evaluation | Due 04/14/2023' (marked with an orange arrow), 'Share Performance Document with Employee', 'Confirm Review Meeting Held | Due 04/28/2023', and 'Confirm Review Meeting Held | Due 04/28/2023'. The 'Conduct Manager Evaluation' task is the current task, with a completion status of '1 / 5'.

Performance Documents

Search: s41 Hide Filters

Saved Search: ManagerViewFacetedSez Save

Filters: Expand All Collapse All

Document Type: Standard Anytime

Actions: 2022-23 Staff Performance Review

Testuser\_Baylor\_s41

E140

Current Task: Conduct Manager Evaluation | Due 04/14/2023

Task Completion: 1 / 5

Manager Rating: Not Rated Yet

Employee Rating: Area of Competence

All Tasks


- ✓ Employee Completes Self-Evaluation | Due 03/20/2023
- Conduct Manager Evaluation | Due 04/14/2023
- Share Performance Document with Employee
- Confirm Review Meeting Held | Due 04/28/2023
- Confirm Review Meeting Held | Due 04/28/2023

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## 2. Completing a Manager Evaluation of the Employee

1. After opening the evaluation, you will see several sections, including an overall Ratings Summary, Core Commitments, Job Performance, and Performance Goals (if applicable).

To enter ratings or comments you must select **Edit** or **Evaluate** for each section. **NOTE:** even though the Ratings Summary is at the top, you may want to complete it last.

 Review and evaluate the contents of each section of the evaluation. Click submit when you're done.


### Ratings Summary

 Edit


Manager Rating	Manager Calculated Rating
Employee Rating	No valid rating level (0.00)
Area of Competence	Employee Calculated Rating
Manager Comments	Area of Competence (2.50)
Employee Comments	

[Show Performance Ratings Descriptions](#)


### Evaluation Topics

 Open

<a href="#">Core Commitment</a> 0 of 6 rated   0 of 6 commented	Manager Calculated Rating
Manager Rating	No valid rating level (0.00)
Employee Rating	Employee Calculated Rating
Area of Mastery	Area of Mastery (4.00)

 Open

<a href="#">Job Performance</a> 0 of 1 rated   0 of 1 commented	Manager Calculated Rating
Manager Rating	No valid rating level (0.00)
Employee Rating	Employee Calculated Rating
Area of Concern	Area of Concern (1.00)

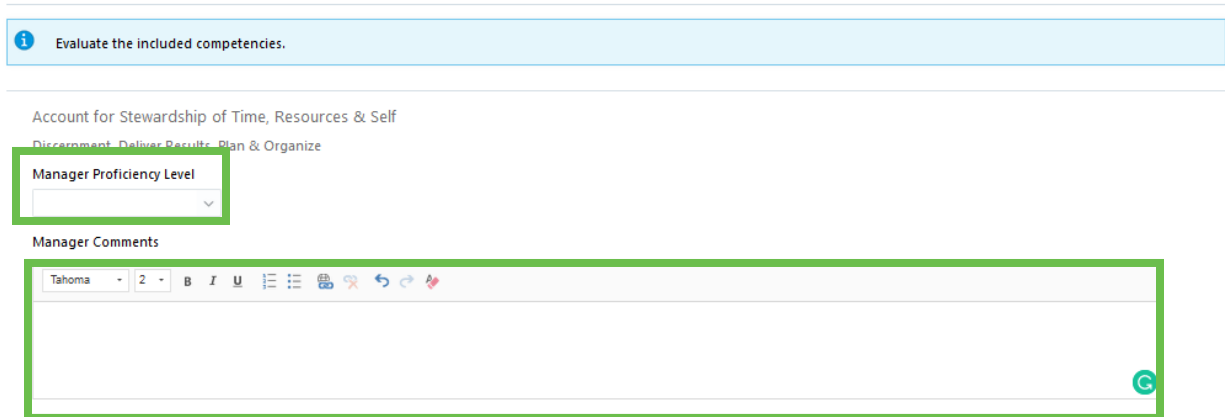
 Open

<a href="#">Performance Goals</a> 0 of 4 commented	
Manager Comments	

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When clicking **Evaluate** you will be able to select a rating by using the drop-down menu. You can select a rating from the following options: **Area of Concern**, **Area of Needed Development**, **Area of Competence**, and **Area of Mastery**. You can also enter comments by typing in the box labeled “Manager Comments.” While it’s always helpful to add comments, you are **REQUIRED** to add comments if you use either the Area of Concern or Area of Mastery ratings. Follow all of these steps for each evaluation topic category.

## Rate and Comment



2. After evaluating the Core Commitment section, evaluate the Job Performance section the same way. If the employee has Performance Goals, there is not a rating given but you can comment in that section. When you are finished evaluating your direct report, an overall rating will be automatically calculated in the top of the screen in the “Ratings Summary” section. Select **Edit** to add final comments and an overall summary of their performance.

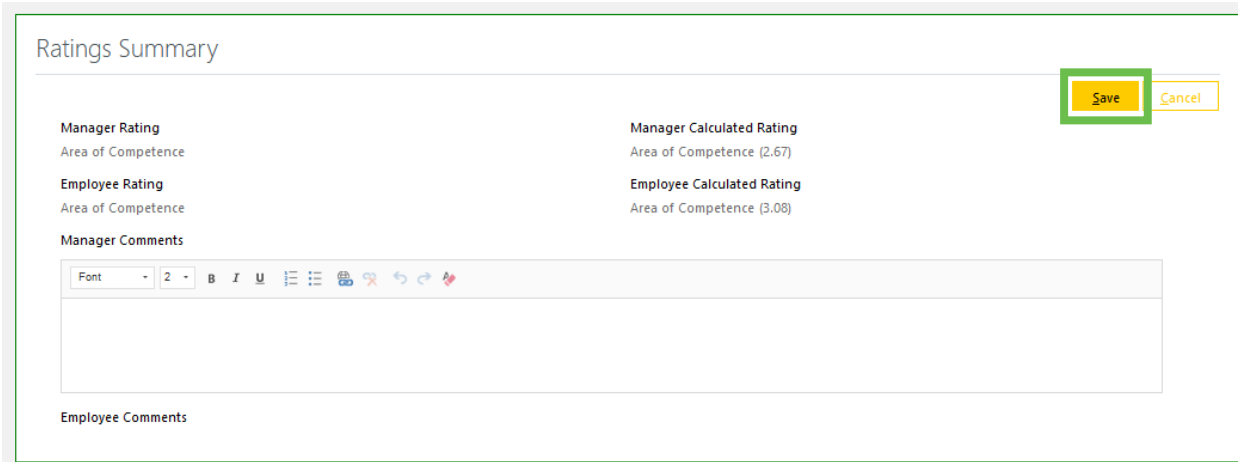
## Ratings Summary

<b>Manager Rating</b>	<b>Manager Calculated Rating</b>
Area of Competence	Area of Competence (2.67)
<b>Employee Rating</b>	<b>Employee Calculated Rating</b>
Area of Competence	Area of Competence (3.08)
<b>Manager Comments</b>	
<b>Employee Comments</b>	
Show Additional Info	



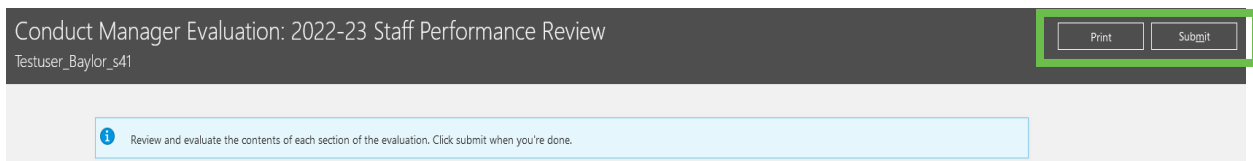
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3. Write final comments and an overall summary of their performance for the year and additional comments for items not addressed elsewhere on the form, including areas of strength and areas of development for future career growth. Select **Save** when you are finished. After saving, you can return to the document to edit or add additional information.

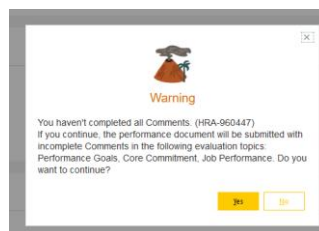


4. When finished, click **Submit** in the upper right-hand corner of the screen to submit your direct report's evaluation. **Once submitted, you will not be able to make any additional changes.**

Note: selecting **Print** prior to submitting will allow you to print or save the document as a PDF. Even after submitting your employee will not be able to see any of the ratings or comments you have made until you share the document (next section).



Note: if you did not add comments to one or more of the sections, you will get a warning message like the one below. If you select **No**, the document will not be submitted, and you can make changes. If you select **Yes**, the document will finish submitting.

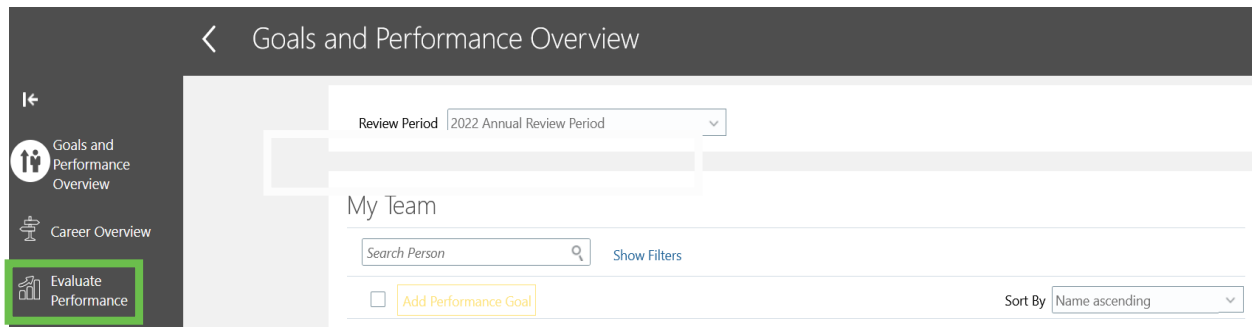




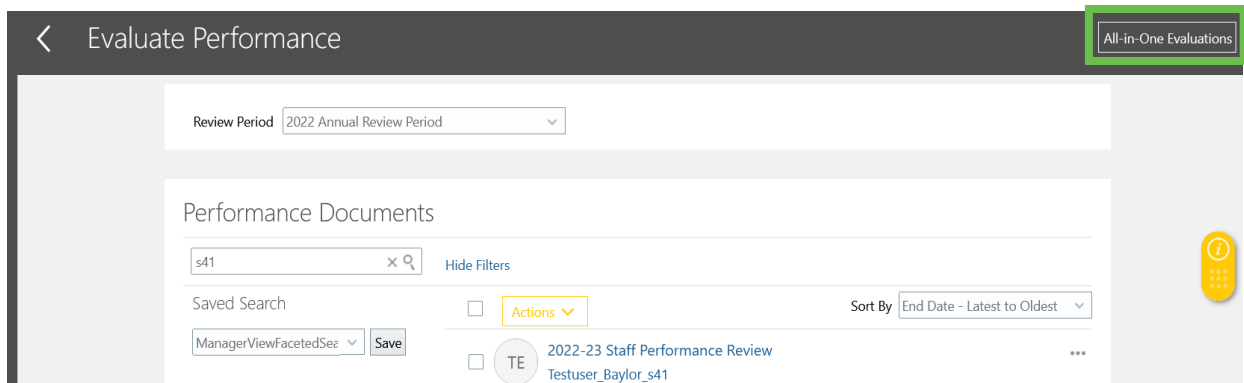
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## 3. Optional All-in-One Method for Entering Reviews

1. After logging in and going to the My Team Career and Performance tile, you will be on the **Goals and Performance Overview** page. Select the **Evaluate Performance** tab on the left side of the screen. *Note: The Review Period should default to 2022 Annual Review Period. If not, use the drop down to change it.*



2. On the **Evaluate Performance** page, click on **All-in-One Evaluations** in the upper right.



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- Select the appropriate performance review from the **Performance Document** dropdown.

All-in-One Evaluations Cancel Submit

Review Period  
2022 Annual Review Period

Performance Document  
Select a performance document

- 2022-23 Athletics Administrative Staff Performance Review
- 2022-23 Police Department Performance Review
- 2022-23 Police Department Supervisor Performance Review
- 2022-23 Staff Performance Review**

Select a performance document to start your manager evaluations.

- You will see all staff members needing to have their ratings entered. The different sections of the review form are tabbed along the top with the current section in bold and underlined. The status, number of items rated and commented on, and each item in the section is to the right of the employee's name.

2022-23 Staff Performance Review Cancel Submit

Review Period  
2022 Annual Review Period

Performance Document  
2022-23 Staff Performance Review

**Core Commitment** Job Performance Performance Goals Ratings Summary

Calculate Ratings Sort By All Statuses Not Available Yet Available to Evaluate Completed

Name	Status	Rated	Commented	Account for Stewardship of Time, Resources & Self				Ei
				Employee		Manager		
				Proficiency	Comments	Proficiency *	Comments	
TE Testuser_Baylor_s41 E140	Available to Evaluate	0/6	0/6	Area of Mastery				Area of Mastery

*Note: the items run off the right margin and there is currently no way to scroll right. The only way to see them is to shrink the screen (CTRL+Mouse wheel on PCs). However, fitting it all in makes it very small and difficult to read.*

2022-23 Staff Performance Review Cancel Submit

Review Period  
2022 Annual Review Period

Performance Document  
2022-23 Staff Performance Review

**Core Commitment** Job Performance Performance Goals Ratings Summary

Calculate Ratings Sort By All Statuses Not Available Yet Available to Evaluate Completed

Name	Status	Rated	Commented	Account for Stewardship of Time, Resources & Self				Build Relationships & Work Collaboratively				Commit to Baylor's Christian Mission and Vision				Pursue Excellence through Continuous Improvement				Seek Learning & Apply Knowledge				Serve Others	
				Employee		Manager		Employee		Manager		Employee		Manager		Employee		Manager		Employee		Manager			
				Proficiency	Comments	Proficiency *	Comments	Proficiency	Comments	Proficiency *	Comments	Proficiency	Comments	Proficiency *	Comments	Proficiency	Comments	Proficiency *	Comments	Proficiency	Comments	Proficiency *	Comments		
TE Testuser_Baylor_s41 E140	Available to Evaluate	0/6	0/6	Area of Mastery				Area of Mastery				Area of Mastery				Area of Mastery				Area of Mastery				Area of Mastery	

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Fortunately, it is not necessary to see the entire screen to make ratings. Clicking on the number shown under Rated or Commented will open that section of the review document to make the ratings as previously described.

2022-23 Staff Performance Review

CancelSubmit

Review Period  
2022 Annual Review Period

Performance Document  
2022-23 Staff Performance Review

Core Commitment

Job Performance

Performance Goals

Ratings Summary

Calculate Ratings

Sort By

All Statuses

Not Available Yet

Available to Evaluate

Completed

Name	Status	Rated	Commented	Account for Stewardship of Time, Resources & Self				
				Employee		Manager		Ei
				Proficiency	Comments	Proficiency *	Comments	
TE Testuser_Baylor_s41 E140	Available to Evaluate	0/6	0/6	Area of Mastery				Area of Master

5. Select the different section tabs to repeat for all sections of the document.

2022-23 Staff Performance Review

CancelSubmit

Review Period  
2022 Annual Review Period

Performance Document  
2022-23 Staff Performance Review

Core Commitment

Job Performance

Performance Goals

Ratings Summary

Calculate Ratings

Sort By

All Statuses

Not Available Yet

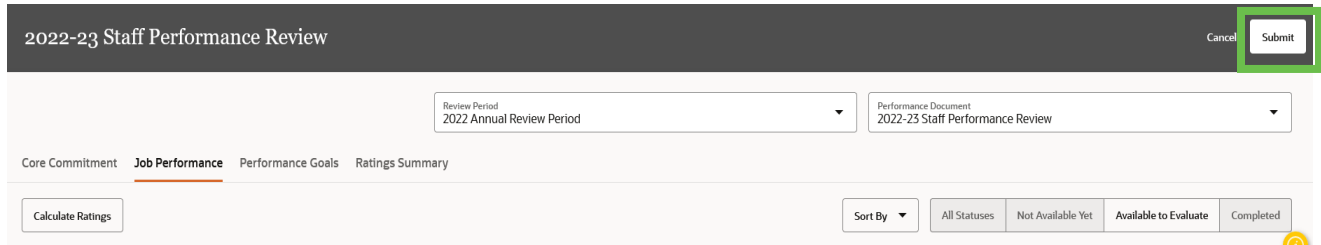
Available to Evaluate

Completed

Name	Status	Rated	Commented	Overall Skills & Performance				Calculated Ratings	
				Employee		Manager		Employee	Manager
				Proficiency	Comments	Proficiency *	Comments		
TE Testuser_Baylor_s41 E140	Available to Evaluate	0/1	0/1	Area of Concern				Area of Concern (1)	No Ratings

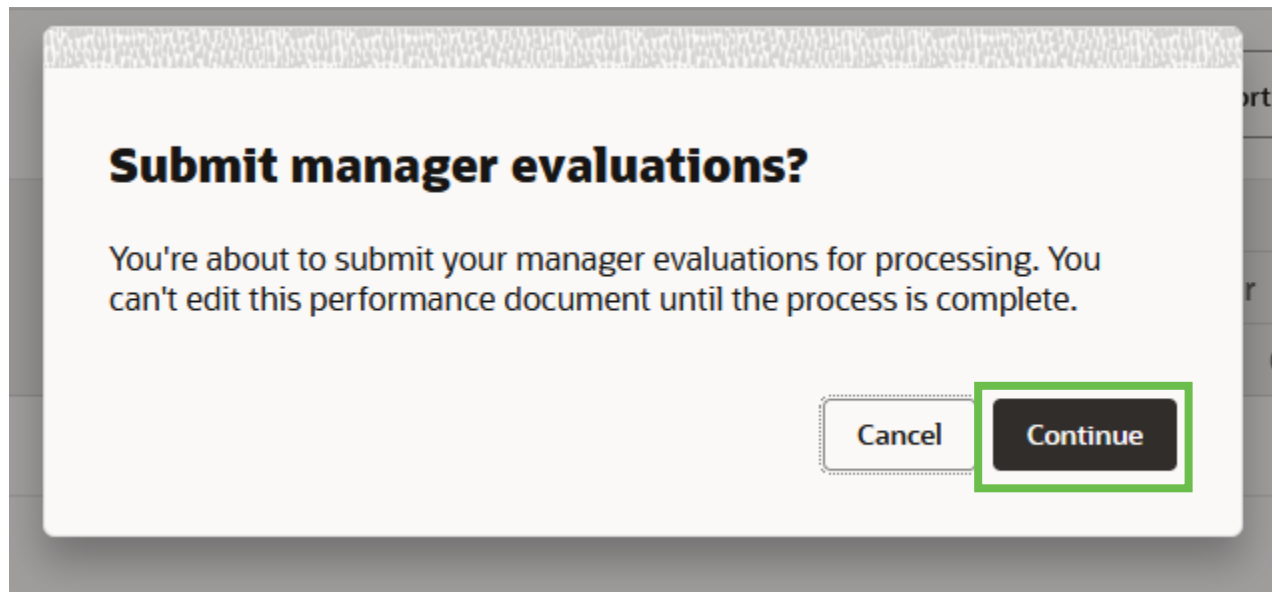
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6. Repeat for each staff member. When you are finished, click **Submit** in the upper right.



The screenshot shows the '2022-23 Staff Performance Review' interface. At the top, there's a dark header with the title and a 'Cancel' button. Below it, a 'Submit' button is highlighted with a green box. The main area has two dropdown menus: 'Review Period' (set to '2022 Annual Review Period') and 'Performance Document' (set to '2022-23 Staff Performance Review'). Below these are tabs: 'Core Commitment', 'Job Performance' (selected), 'Performance Goals', and 'Ratings Summary'. At the bottom, there's a 'Calculate Ratings' button and a 'Sort By' dropdown. On the right, there are filters: 'All Statuses', 'Not Available Yet', 'Available to Evaluate', and 'Completed'.

7. After submitting, you will see this warning. Select **Continue**.



The screenshot shows a warning dialog box titled 'Submit manager evaluations?'. The text inside reads: 'You're about to submit your manager evaluations for processing. You can't edit this performance document until the process is complete.' At the bottom right, there are two buttons: 'Cancel' and 'Continue'. The 'Continue' button is highlighted with a green box.

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## 4. Sharing and Releasing a Manager Evaluation

1. To begin, ensure that you are inside of your direct report's performance profile. Under the "Performance Documents" section you can check the tasks you need to finish in order to share and release the Manager Evaluation.

The screenshot shows the 'Performance Documents' section for the '2022 Annual Review Period'. The search bar contains 's41'. The 'Actions' dropdown is open, showing a list of tasks. The 'All Tasks' list is highlighted with a green box. The tasks are:

- Employee Completes Self-Evaluation | Due 03/20/2023
- Conduct Manager Evaluation | Due 04/14/2023
- Share Performance Document with Employee
- Confirm Review Meeting Held | Due 04/28/2023
- Confirm Review Meeting Held | Due 04/28/2023

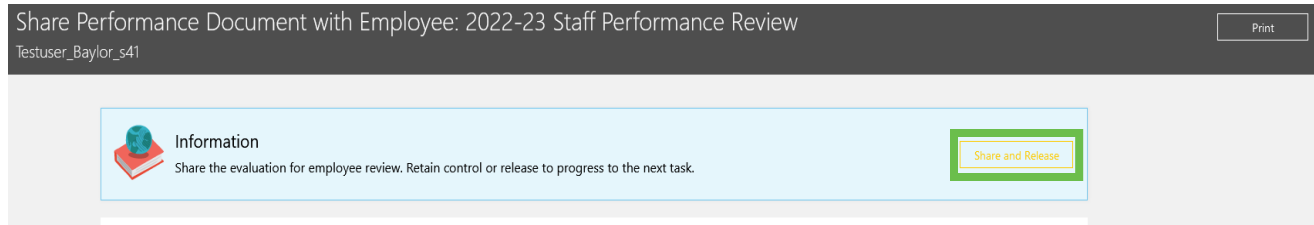
2. Next, click on the performance evaluation by selecting the **2022-23 Staff Performance Review** link.

The screenshot shows the 'Performance Documents' section for the '2022 Annual Review Period'. The search bar contains 's41'. The 'Current Task' list is highlighted with a green box. The tasks are:

- Employee Completes Self-Evaluation | Due 03/20/2023
- Conduct Manager Evaluation | Due 04/14/2023
- Share Performance Document with Employee
- Confirm Review Meeting Held | Due 04/28/2023
- Confirm Review Meeting Held | Due 04/28/2023

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3. In the upper right of the screen, click **Share and Release** to share the evaluation for employee review. This will give the employee access to your ratings and comments.



4. After clicking Share and Release, select **Submit** to release the evaluation to the employee.



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## 5. Indicating the Performance Discussion Was Held

1. Return to the Evaluate Performance page and select the **2022-23 Staff Performance Review** link.

Review Period 2022 Annual Review Period ▾

### Performance Documents

✕ 🔍

Hide Filters

Saved Search

ManagerViewFacetedSea Save

Filters

Reset ⚙️

Expand All Collapse All

^ Employees Clear

**All Evaluatees**

Directs Only

^ Document Type Clear

☒ Standard

☐ Anytime

☐ Actions ▾

☐ TE 2022-23 Staff Performance Review

Testuser\_Baylor\_s41

E140

Current Task

Confirm Review Meeting Held | Due 04/28/2023

Task Completion

3 / 5

Manager Rating

Area of Competence

Employee Rating

Area of Competence

All Tasks

☒ Employee Completes Self-Evaluation | Due 03/20/2023

☒ Conduct Manager Evaluation | Due 04/14/2023

☒ Share Performance Document with Employee

☒ Confirm Review Meeting Held | Due 04/28/2023


☐ Confirm Review Meeting Held | Due 04/28/2023

2. In the upper right of the screen, click **Indicate Meeting Held**.

Confirm Review Meeting Held: 2022-23 Staff Performance Review

Testuser\_Baylor\_s41

Print

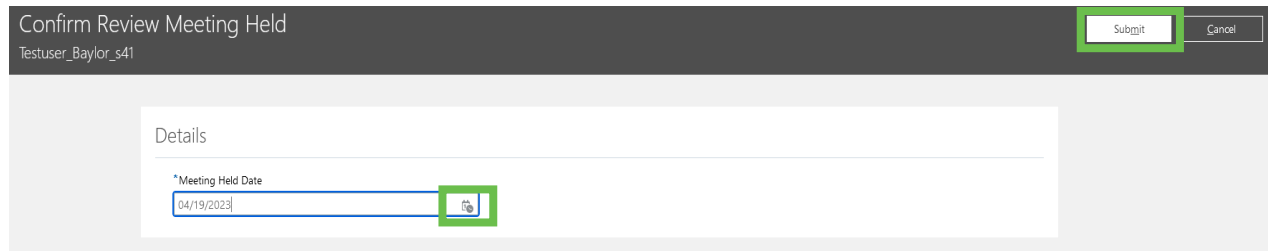
 Information

Select the date of the review meeting.

Indicate Meeting Held

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3. Next, click the **Calendar icon** to enter the date when you had the meeting with your direct report and then **Submit**.



The screenshot shows a web form titled "Confirm Review Meeting Held" with the user "Testuser\_Baylor\_s41". At the top right are "Submit" and "Cancel" buttons. Below is a "Details" section with a label "\*Meeting Held Date" and a date input field containing "04/19/2023". A calendar icon is visible to the right of the date field. The "Submit" button is highlighted with a green border.

You have now completed all of your steps. Your employee will now be able to confirm the meeting was held in order to finalize the process in Ignite.

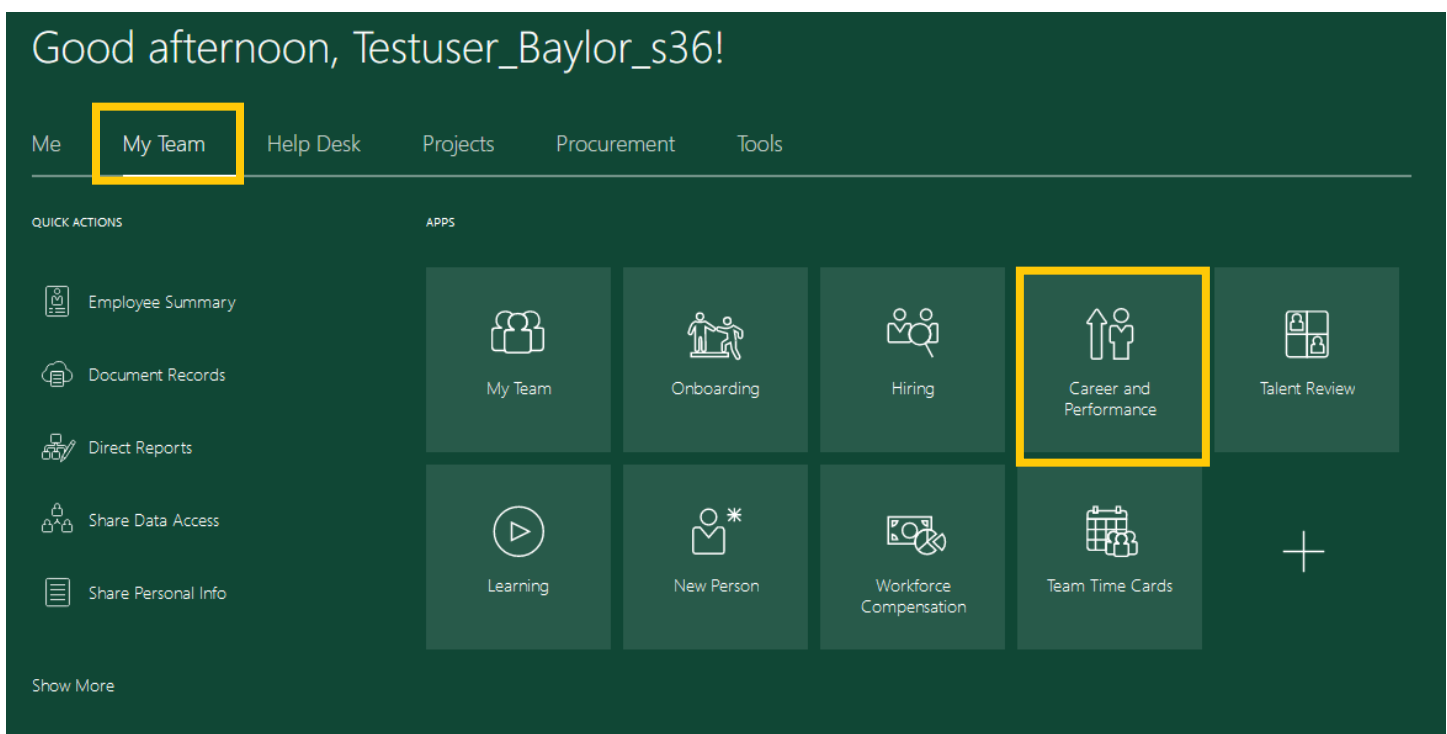


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## Viewing Process Progress of Direct and Indirect Reports

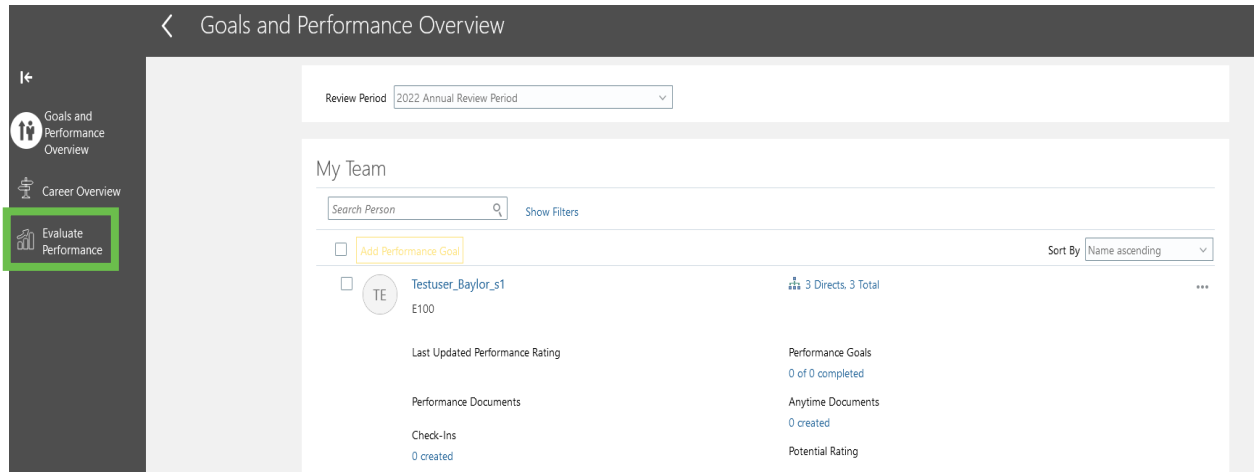
Managers can view the individual progress of their employees in the performance appraisal process from the regular **Career and Performance** tile.

1. From the **My Team** tab on the main Ignite page, selecting **Career and Performance** opens up the **Goal and Performance Overview** page.

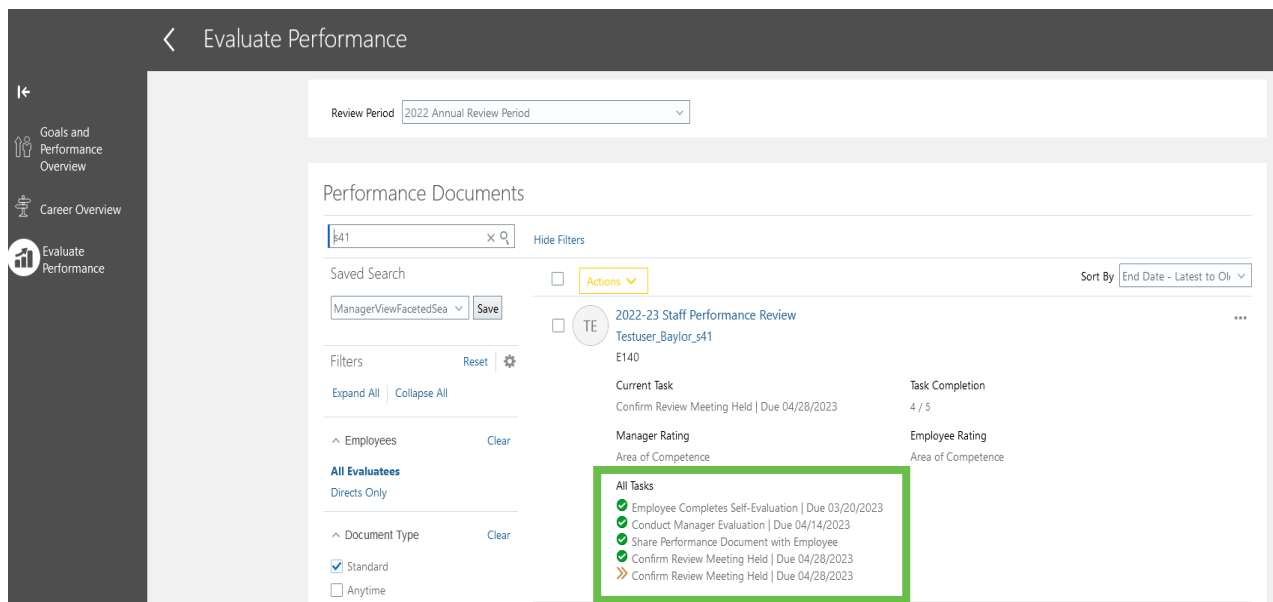


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2. Select **Evaluate Performance** from the options on the left side of the screen.



3. The Evaluate Performance screen lets you see where each direct report is at in the process. In this example Testuser\_Baylor\_s41 is needing to **Confirm Review Meeting Held**.



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4. Note: There are a number of filters down the left side. You can filter to see only your direct reports or everyone who reports up to you by changing the **Employees** filter.

The **Document Status** filter defaults to **In Progress** so employee who have already completed their reviews will not show unless you clear or change the filter setting.

Review Period 2022 Annual Review Period

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Performance Documents

Hide

---

Saved Search

ManagerViewFacetedSi Save

---

Filters Reset ⚙️

[Expand All](#) [Collapse All](#)

^ Employees Clear

**All Evaluatees**

[Directs Only](#)

^ Document Type Clear

☒ Standard

☐ Anytime

^ Tasks

☐ Assigned to me

^ Assignment Type Clear

☐ Nonprimary

☒ Primary

^ Assignment Status Clear

☒ Active

☐ Inactive

☐ Suspended

^ Document Status Clear

**In progress**

[Completed](#)

[Canceled](#)