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 manger 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).

Index

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-valuation. (by March 20)	Manager completes the evaluation. (by April 14)	Manager shares completed evaluation with employee, and they meet to discuss. (by April 28)	Manager indicates performance review meeting was held. (by April 28)	Employee confirms performance review meeting was held. (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.
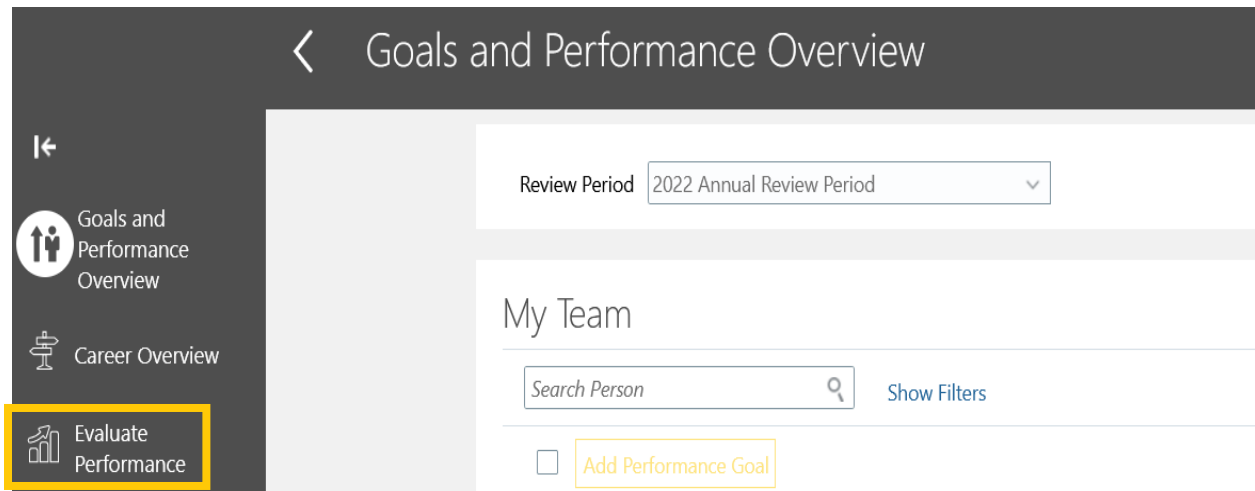
Completing the Evaluation Process

1. 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.
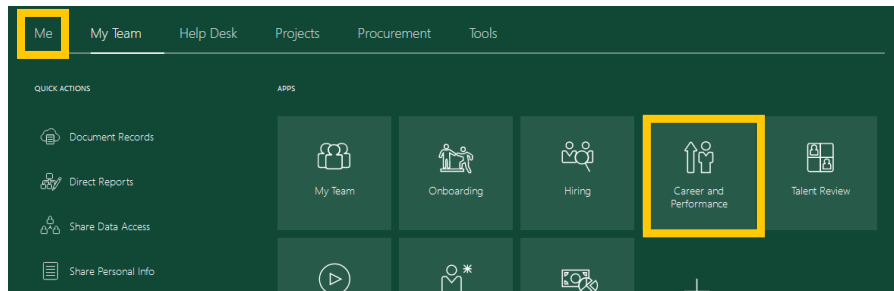
2. On the Goals and Performance Overview page, click **Evaluate Performance** on the left side of the screen.

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

s41	Hide Filters

Saved Search

ManagerViewFacetedSea ∨ | Save

Filters Reset ⚙

Expand All | Collapse All

∧ Employees   Clear
All Evaluatees
Directs Only

∧ Document Type   Clear
☑ Standard
☐ Anytime

☐ Actions ∨   Sort By End Date - Latest to Oldest ∨

☐ TE **2022-23 Staff Performance Review**   ⋯
        Testuser_Baylor_s41
        E140

Current Task   Task Completion
Conduct Manager   1 / 5
Evaluation | Due 04/14/2023

Manager Rating   Employee Rating
Not Rated Yet   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. 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.

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

ⓘ   Evaluate the included competencies.

Account for Stewardship of Time, Resources & Self
Discernment, Deliver Results, Plan & Organize

Manager Proficiency Level

Manager Comments

| Tahoma | ▾ | 2 | ▾ | **B** | *I* | <u>U</u> | ≣ | ⋮≣ | 🖴 | 🔧 | ↶ | ↷ | 🖌 |

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.
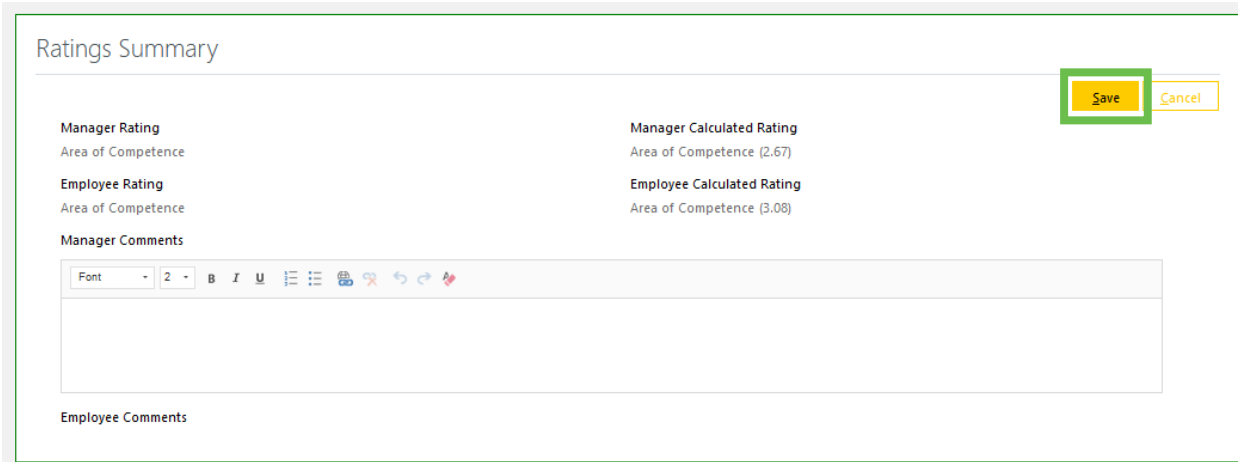
Ratings Summary   ✏ Edit   ⌃

Manager Rating   Manager Calculated Rating
Area of Competence   Area of Competence (2.67)

Employee Rating   Employee Calculated Rating
Area of Competence   Area of Competence (3.08)

Manager Comments

Employee Comments

Show Additional Info
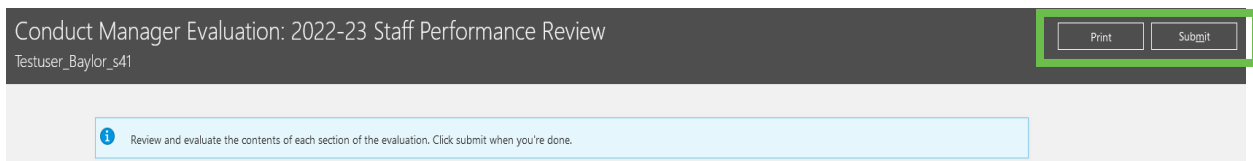
3. Write final comments and an overall summary of their performance for the year and additional comments for items not addressed elsewhere on the form, including areas of strength and areas of development for future career growth. Select **Save** when you are finished. After saving, you can return to 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.*
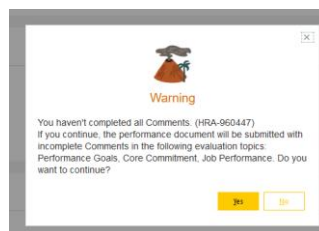
3. Optional All-in-One Method for Entering Reviews

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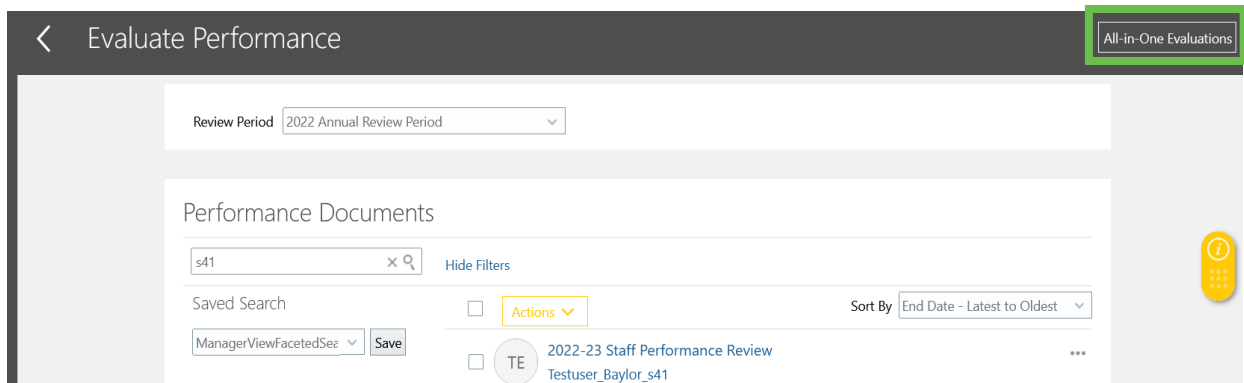
3. Select the appropriate performance review from the **Performance Document** dropdown.

4. **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.**

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.

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.

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

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

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

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.
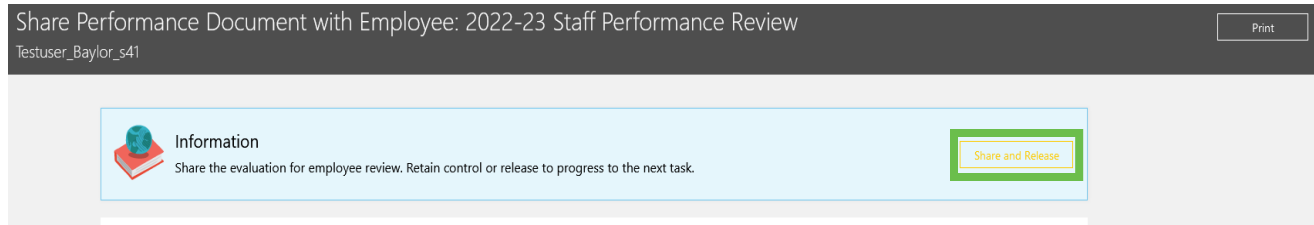

2. Next, click on the performance evaluation by selecting the **2022-23 Staff Performance Review** link.

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.

Share Performance Document with Employee: 2022-23 Staff Performance Review
Testuser_Baylor_s41

Print

Information
Share the evaluation for employee review. Retain control or release to progress to the next task.

Share and Release

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

Share and Release
Testuser_Baylor_s41

Submit   Cancel

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

[s41   × 🔍]   Hide Filters

Saved Search

[ManagerViewFacetedSea ▾] [Save]

☐ [Actions ▾]

Filters   Reset ⚙

☐ TE **2022-23 Staff Performance Review**
Testuser_Baylor_s41

Expand All | Collapse All

E140

⌃ Employees   Clear

Current Task   Task Completion

All Evaluatees

Confirm Review Meeting Held | Due 04/28/2023   3 / 5

Directs Only

Manager Rating   Employee Rating

Area of Competence   Area of Competence

⌃ Document Type   Clear

All Tasks

☑ Standard

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

☐ Anytime

✅ 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   [Print]
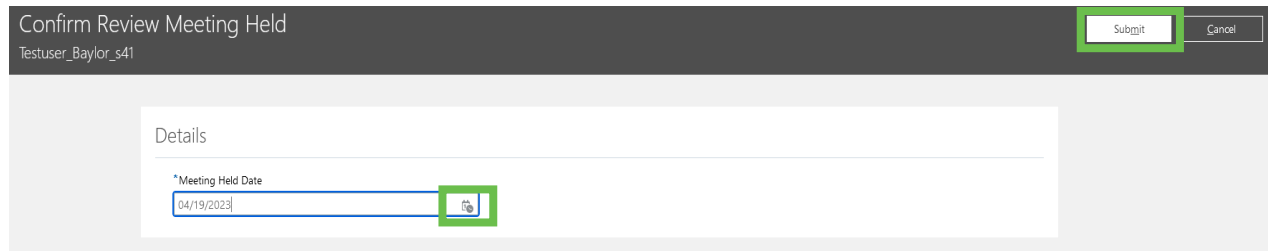Testuser_Baylor_s41

Information   [Indicate Meeting Held]
Select the date of the review meeting.

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

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.
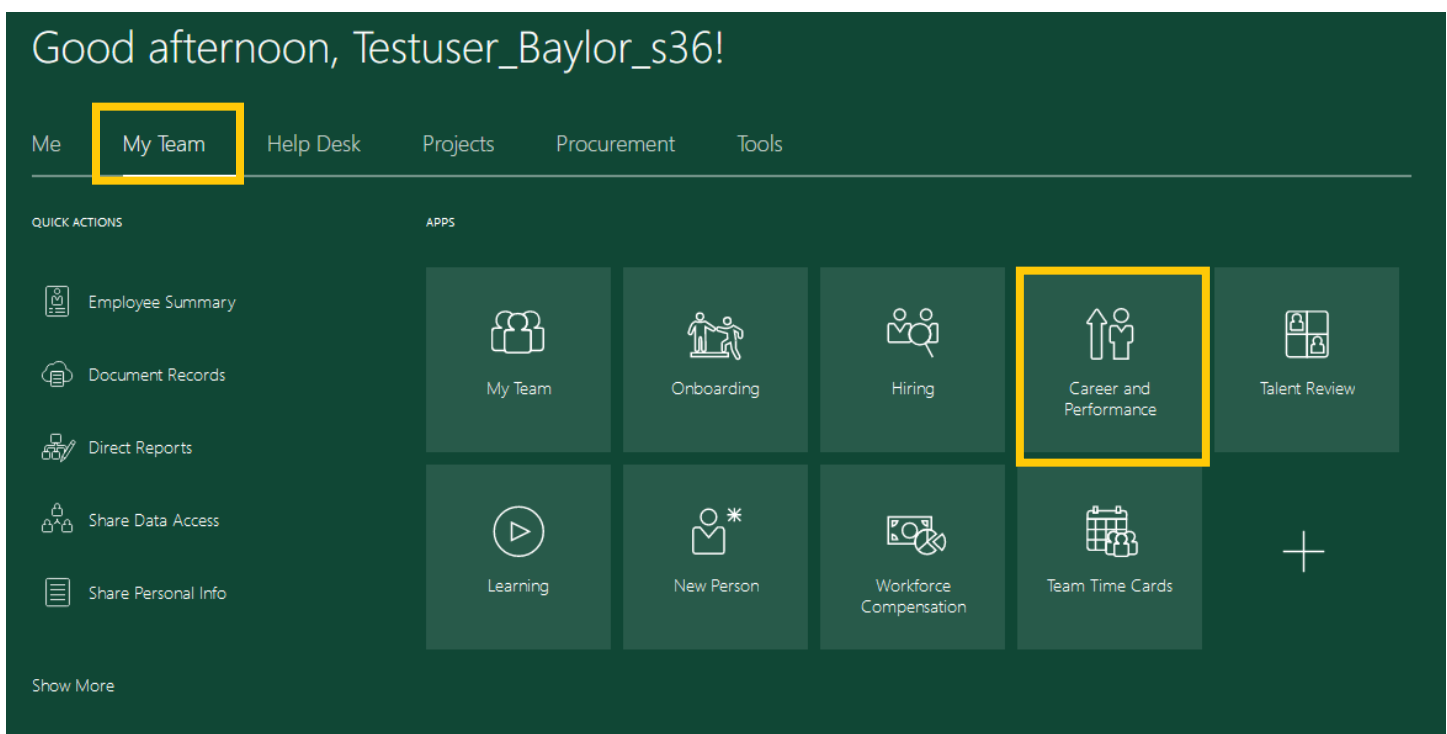
## Viewing Process Progress of Direct and Indirect Reports

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.
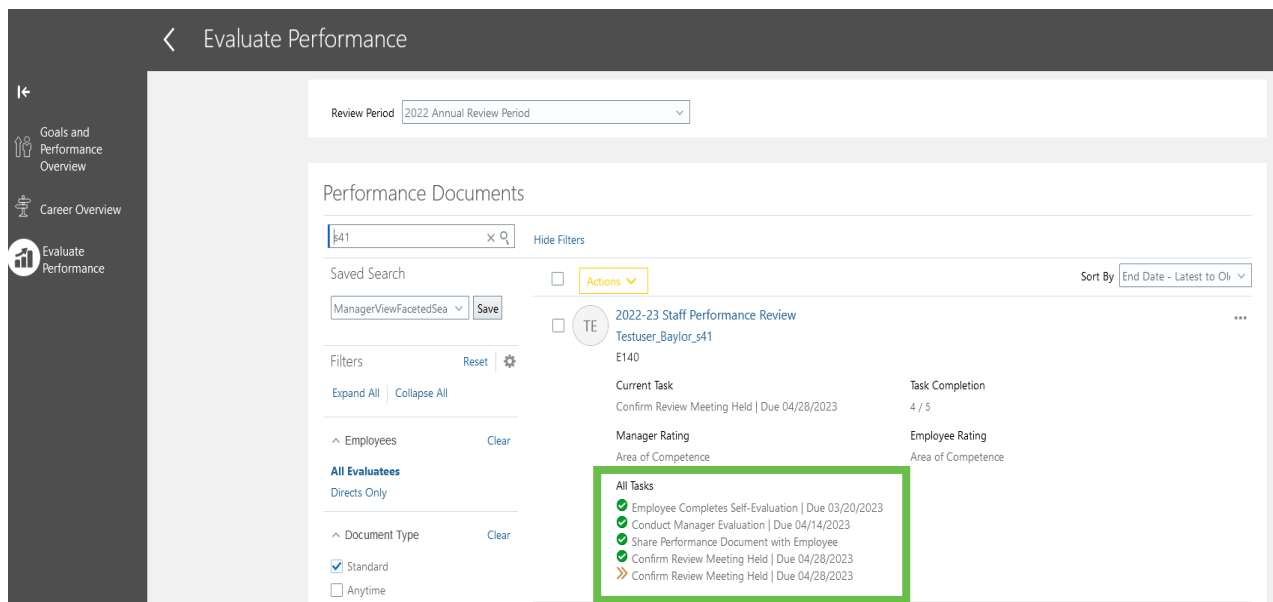
2. Select **Evaluate Performance** from the options on the left side of the screen.
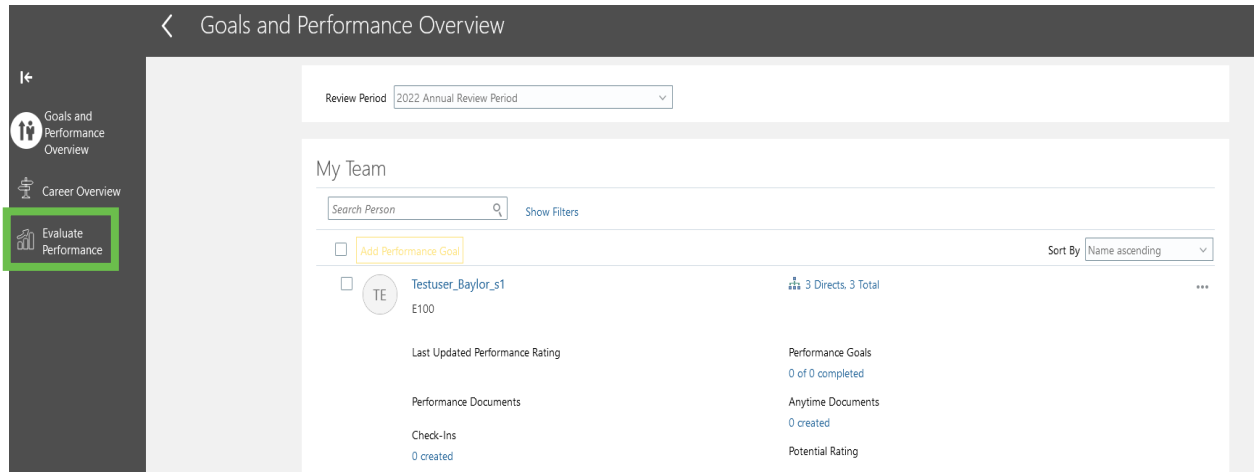
3. The Evaluate Performance screen lets you see where each direct report is at in the process. In this example Testuser_Baylor_s41 is needing to **Confirm Review Meeting Held**.

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.*