

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 2024-25 are automatically pulled into the review process. New goals for 2024-25 will be added in a separate process 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 Difference from Previous Years

- There are no notable differences from last year.

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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. (by March 19)	Manager completes the evaluation. (by April 11)	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 > 2024-25 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

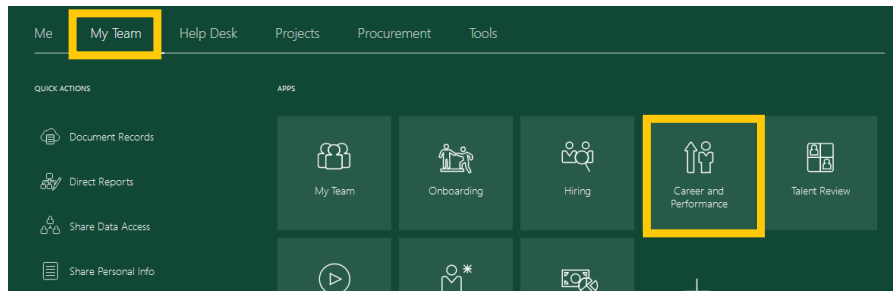
1. Navigate to evaluation and open as described above. Click the **Indicate Meeting Held** button, then enter the **Meeting Held Date**, and **Submit**. The employee also needs to confirm the meeting was held but cannot do so until *after* you have first indicated the meeting was held.

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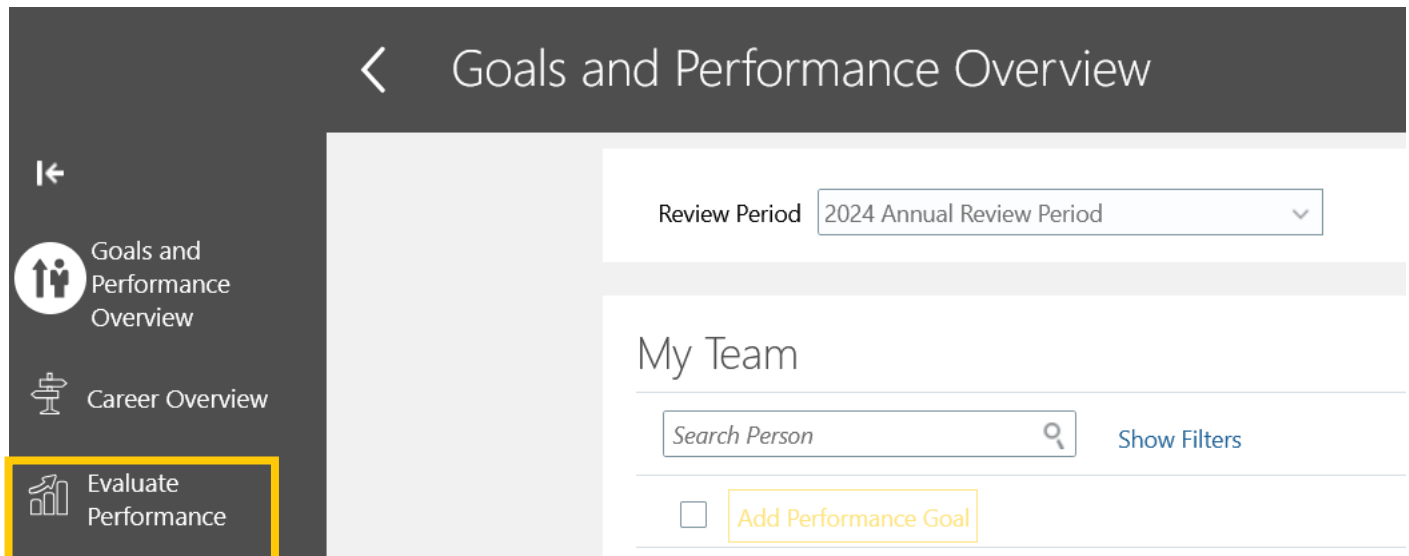
Completing the Evaluation Process

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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- In the Performance Documents section, select the **2024-25 Staff Performance Review** link to open the evaluation. This page also shows which stages are complete with the green check mark, the current stage indicated by the two arrows, and what steps need to be completed.

Please note: Ignite automatically compresses the information of any employee after the first listed. To see all of the information, click on the “V” to the bottom right of the employee’s section.


The screenshot displays the 'Performance Documents' interface. On the left, there is a sidebar with a search bar, filters, and a 'Saved Search' section. The main area shows a list of performance documents. Two documents are visible, both titled '2024-25 Staff Performance Review'. The first document is for 'Testuser_Baylor_s49' (E149) and the second is for 'Testuser_Baylor_s49' (E148). The first document's 'Current Task' section shows 'Employee Completes Self-Evaluation' and 'Conduct Manager Evaluation' with a task completion of 0/5. The second document's 'Current Task' section shows 'Share Performance Document with Employee' with a task completion of 2/5. The 'Manager Rating' for the second document is 'Consistently Meets Expectations'. The 'Employee Rating' for the second document is also 'Consistently Meets Expectations'. A green box highlights the '2024-25 Staff Performance Review' link for the first document. Another green box highlights the 'All Tasks' section for the first document, which lists: 'Employee Completes Self-Evaluation', 'Conduct Manager Evaluation', 'Share Performance Document with Employee', 'Confirm Review Meeting Held', and 'Confirm Review Meeting Held'. A third green box highlights a dropdown arrow at the bottom right of the second document's section.

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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
	Area of Competence (2.50)
Manager Comments	
Employee Comments	

[Show Performance Ratings Descriptions](#)

Evaluation Topics Open

Core Commitment	Manager Calculated Rating	Open
0 of 6 rated 0 of 6 commented	No valid rating level (0.00)	
Manager Rating	Employee Calculated Rating	
Employee Rating	Area of Mastery (4.00)	
Area of Mastery		
Job Performance	Manager Calculated Rating	Open
0 of 1 rated 0 of 1 commented	No valid rating level (0.00)	
Manager Rating	Employee Calculated Rating	
Employee Rating	Area of Concern (1.00)	
Area of Concern		
Performance Goals		Open
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: **Does Not Meet Expectations**, **Inconsistently Meets Expectations**, **Consistently Meets Expectations**, and **Consistently Exceeds Expectations**. You can also enter comments by typing in the box labeled “Manager Comments.” While it’s always recommended to add comments to explain the rating, you are **REQUIRED** to add comments if you use either the Does Not Meet Expectations or Consistently Exceeds Expectations ratings. Follow all of these steps for each evaluation topic category.

The screenshot shows a form with two columns: "Manager Proficiency Level" and "Employee Proficiency Level". The "Manager Proficiency Level" dropdown menu is open, showing four options: "Consistently Exceeds Expectations", "Consistently Meets Expectations", "Inconsistently Meets Expectations", and "Does Not Meet Expectations". The "Employee Proficiency Level" is currently set to "Consistently Exceeds Expectations". Below the dropdowns is a large text area for "Manager Comments" with a character count at the bottom right: "Words: 0 Characters (with HTML): 0".

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



Manager Rating

Consistently Meets Expectations

Employee Rating

Consistently Meets Expectations

Manager Comments

Manager Calculated Rating

Consistently Meets Expectations (2.50)

Employee Calculated Rating

Consistently Meets Expectations (2.50)

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- 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.

Ratings Summary

Manager Rating Consistently Meets Expectations	Manager Calculated Rating Consistently Meets Expectations (2.50)
Employee Rating Consistently Meets Expectations	Employee Calculated Rating Consistently Meets Expectations (2.50)

Manager Comments

Rich text editor toolbar: A^α, A1, B, I, U, List, Link, Undo, Redo, Italic

Text area with a vertical cursor.

Words: 0 Characters (with HTML): 0

Save **Cancel**

- 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).

Conduct Manager Evaluation: 2024-25 Staff Performance Review

Testuser_Baylor_s49

Print

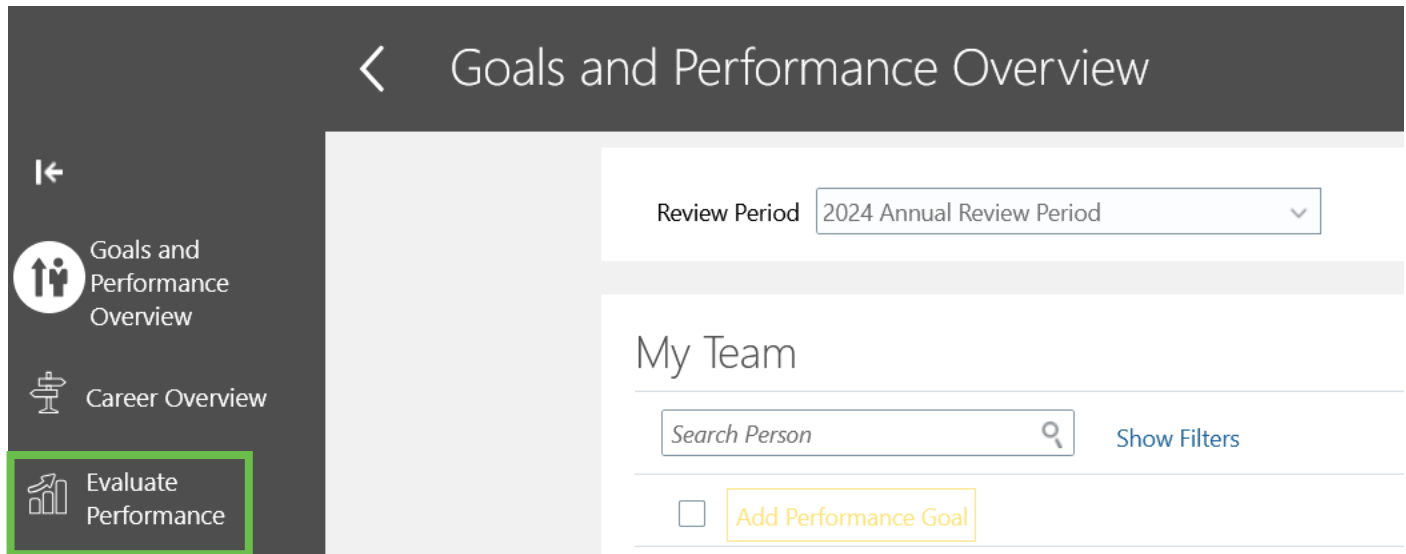
Submit

*Note: if you did not add comments to one or more of the sections, you will get a warning message. 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

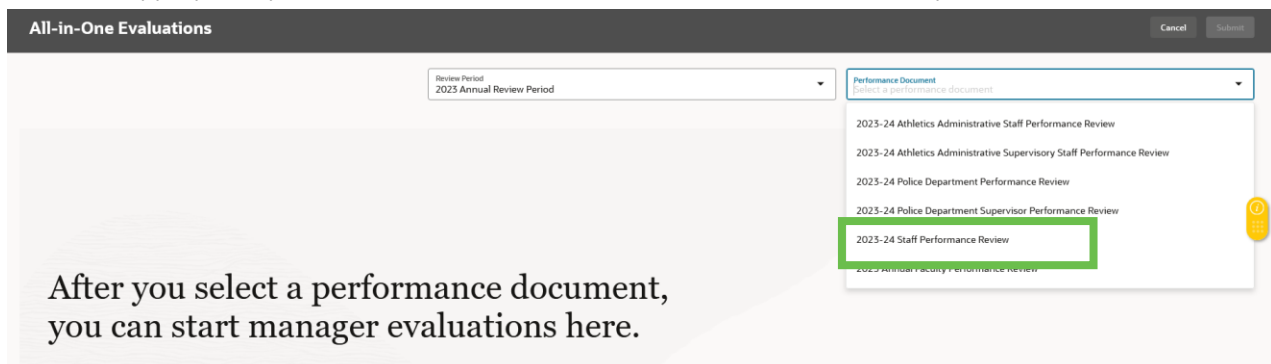
1. After logging in and going to the My Team Career and Performance tile, you will be on the **Goals and Performance Overview** page. Select the **Evaluate Performance** tab on the left side of the screen.



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.



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- 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.

2024-25 Staff Performance Review Cancel Submit

Review Period: 2024 Annual Review Period | Performance Document: 2024-25 Staff Performance Review

Core Commitment | Job Performance | Performance Goals | Ratings Summary

Actions | Sort By | All Statuses | Not Available Yet | Available to Evaluate | Completed

Name	Evaluation Status	Rated	Commented	Account for Stewardship of Time, Resources & Self					
				Employee		Manager		Error	
				Proficiency	Comments	Proficiency *	Comments		Proficiency
TE Testuser_Baylor_s E149	Self-evaluation incomplete Available to Evaluate	0/6	0/6						
TE Testuser_Baylor_s49 E148	Available to Evaluate	6/6	0/6	Consistently Meets Expectations		Consistently Meets Expectations			Consistently Meets Expectations

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 E147	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.

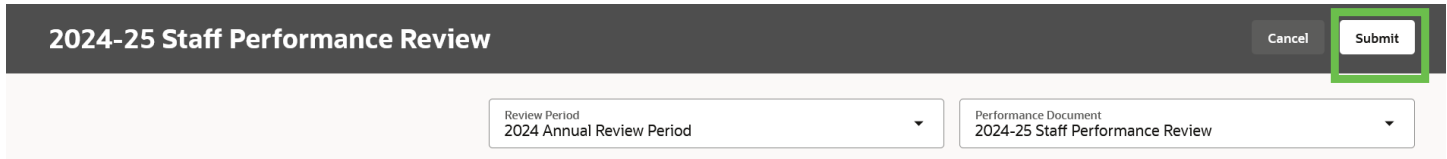
Core Commitment		Job Performance	Performance Goals	Ratings Summary				
Calculate Ratings				Sort By	All Statuses	Not Available Yet	Available to Evaluate	Completed
Name	Status	Rated	Commented	Account for Stewardship of Time, Resources & Self				
				Employee		Manager		
Proficiency	Comments	Proficiency *	Comments					
TE Testuser_Baylor_s41 E140	Available to Evaluate	0/6	0/6	Consistently Exceeds Expectations			☑	Co Exp

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

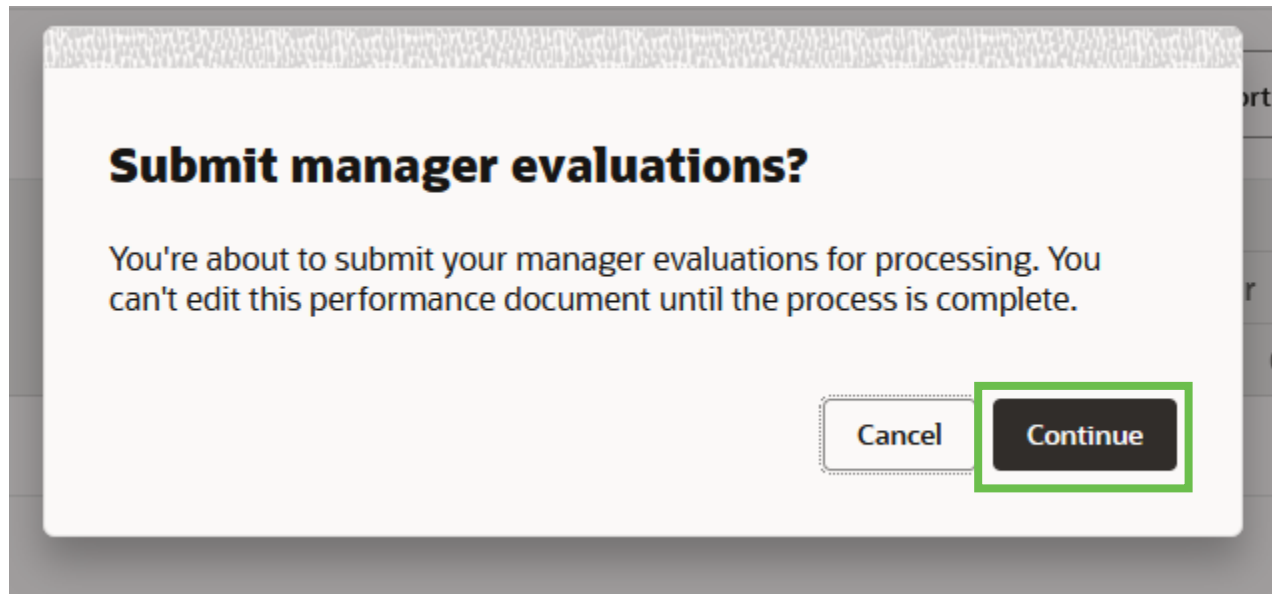
Core Commitment		Job Performance	Performance Goals	Ratings Summary				
Calculate Ratings				Sort By	All Statuses	Not Available Yet	Available to Evaluate	Completed
Name	Status	Rated	Commented	Overall Skills & Performance				
				Employee		Manager		
Proficiency	Comments	Proficiency *	Comments					
TE Testuser_Baylor_s41 E140	Available to Evaluate	0/1	0/1	Consistently Meets Expectations			☑	Co Exp

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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**.



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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 under "Evaluate Performance" you can check the tasks you need to finish in order to share and release the Manager Evaluation.

TE [2024-25 Staff Performance Review](#)
Testuser_Baylor_s49
E148

Current Task Share Performance Document with Employee	Task Completion 2 / 5
Manager Rating Consistently Meets Expectations	Employee Rating Consistently Meets Expectations

All Tasks

- ✔ Employee Completes Self-Evaluation
- ✔ Conduct Manager Evaluation
- Share Performance Document with Employee
- Confirm Review Meeting Held
- Confirm Review Meeting Held

2. Next, click on the performance evaluation by selecting the **2024-25 Staff Performance Review** link.

Performance Documents

Saved Search:


Filters:

<input type="checkbox"/>	Actions ▼	Sort By: <input type="text" value="Document Name - Z to A"/>
<input type="checkbox"/>	TE 2023-24 Staff Performance Review Testuser_Baylor_s41 E140	
	Current Task Share Performance Document with Employee	Task Completion 2 / 5
	Manager Rating	Employee Rating

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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.

Share Performance Document with Employee: 2024-25 Staff Performance Review
Testuser_Baylor_s49



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_s49

Submit **Cancel**

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5. Indicating the Performance Discussion Was Held

1. Return to the Evaluate Performance page and select the **2024-25 Staff Performance Review** link.

TE **2024-25 Staff Performance Review**
Testuser_Baylor_s49
E148

Current Task	Task Completion
Confirm Review Meeting Held	3 / 5
Manager Rating	Employee Rating
Consistently Meets Expectations	Consistently Meets Expectations

All Tasks

- ✔ Employee Completes Self-Evaluation
- ✔ Conduct Manager Evaluation
- ✔ Share Performance Document with Employee
- Confirm Review Meeting Held
- Confirm Review Meeting Held

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

Confirm Review Meeting Held: 2024-25 Staff Performance Review

Testuser_Baylor_s49



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**.

Confirm Review Meeting Held
Testuser_Baylor_s49

Submit Cancel

Details

*Meeting Held Date
mm/dd/yyyy

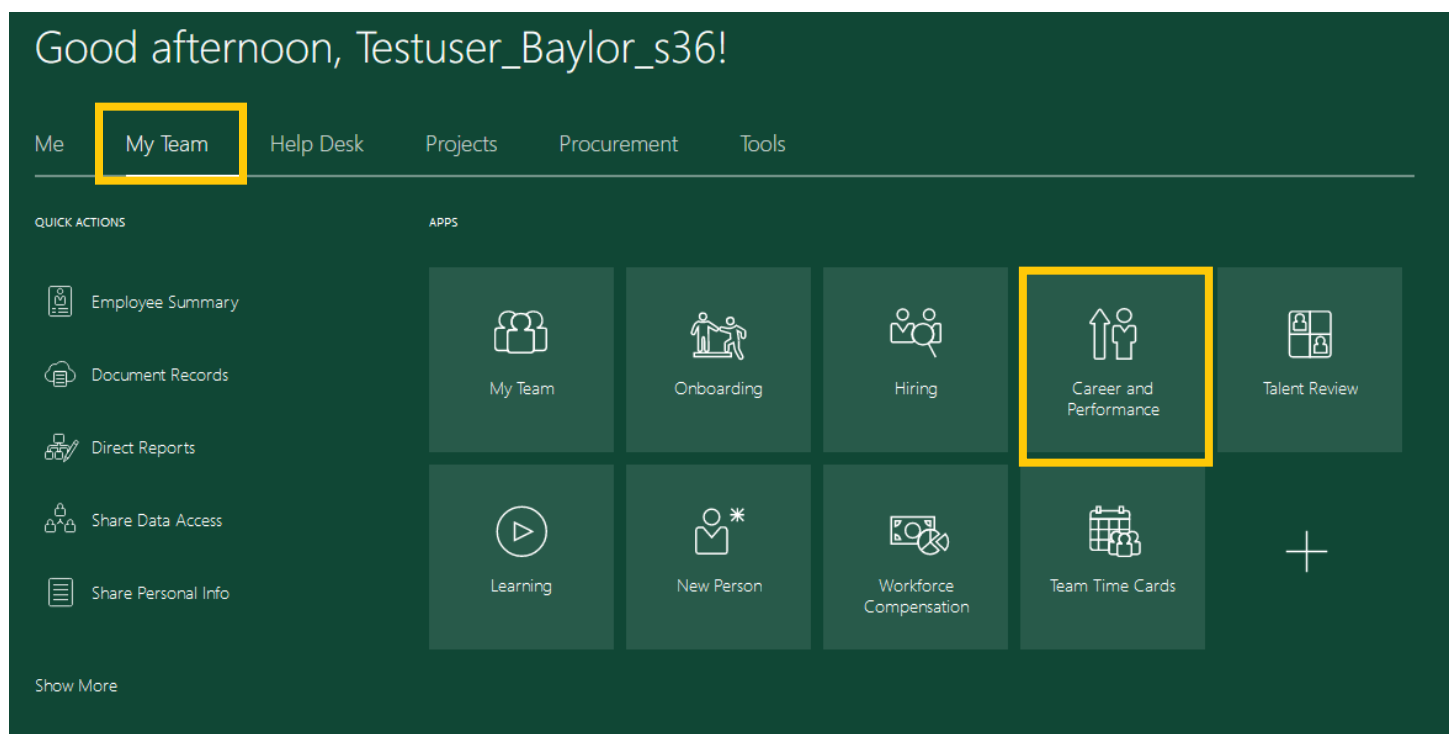
You have now completed all of your steps. Your employee will now be able to confirm the meeting was held in order to finalize the process in Ignite.

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Viewing Progress of Direct Reports

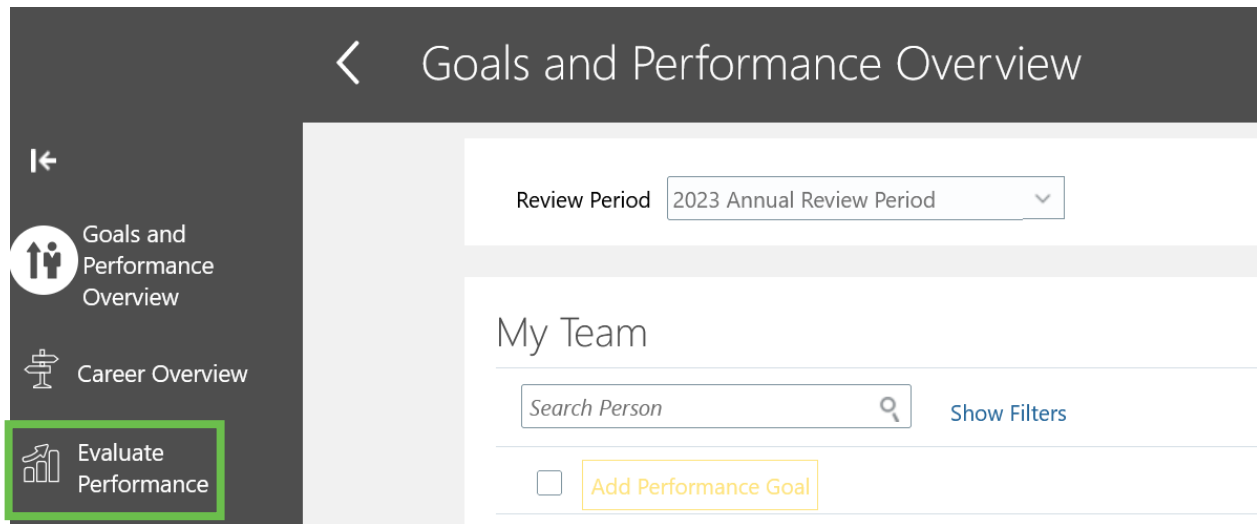
Managers can view the individual progress of their employees in the performance appraisal process from the regular **Career and Performance** tile.

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

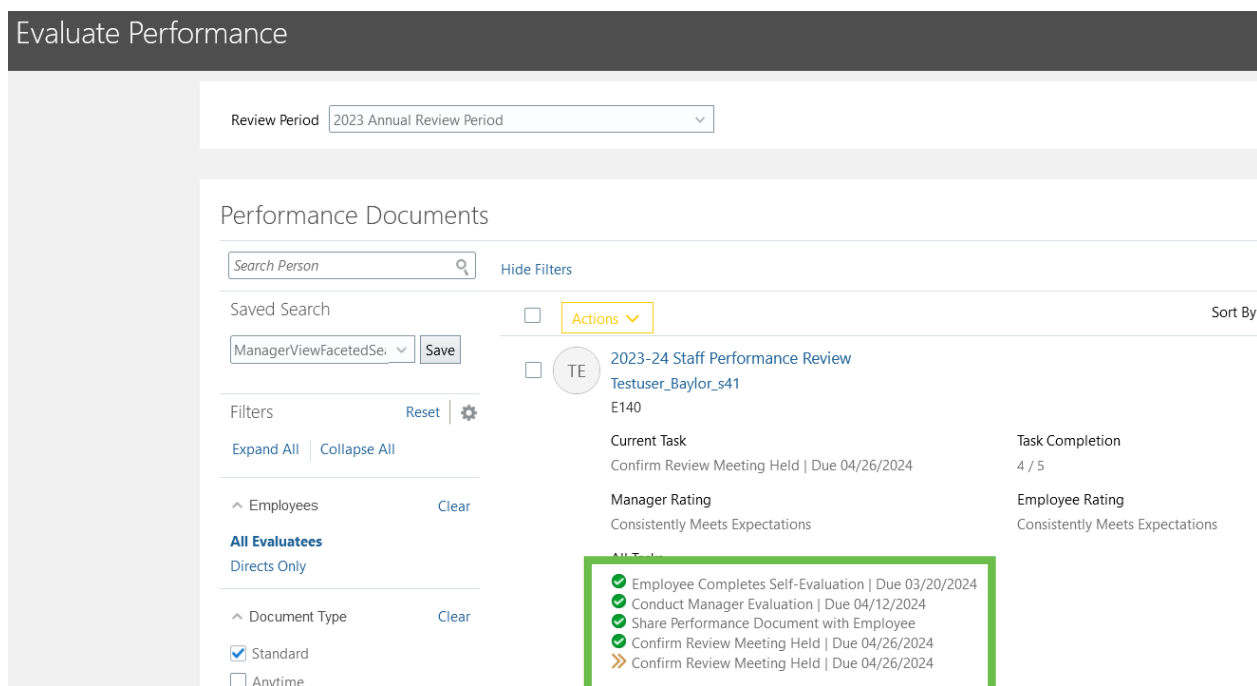


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2. Select **Evaluate Performance** from the options on the left side of the screen.



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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Viewing Process Progress of Indirect Reports

Managers can view the individual reviews of all employees who report up to them 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. On the **Goals and Performance Overview** page, select **Show Filters**.

The screenshot displays the 'Goals and Performance Overview' interface. On the left is a dark sidebar with three menu items: 'Goals and Performance Overview' (selected), 'Career Overview', and 'Evaluate Performance'. The main content area has a dark header with a back arrow and the title 'Goals and Performance Overview'. Below the header, there is a 'Review Period' dropdown menu set to '2024 Annual Review Period'. The 'My Team' section features a search bar labeled 'Search Person' with a magnifying glass icon, and a 'Show Filters' button highlighted with a green border. Below the search bar is a yellow 'Add Performance Goal' button. A list of team members is shown, starting with 'Testuser_Baylor_s37' (E136) and a 'Last Updated Performance Rating' label. The bottom of the page shows the start of a 'Performance Documents' section.

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3. There will be a number of filters down the left side. The **Display** filter defaults to **Direct Reports**. Click on **All Reports** and it will show every employee who reports up to you. You'll be able to see every employee reporting up to you as well as the overall rating (if complete). Clicking on an employee's name will let you click through to see their entire performance review.

Review Period

My Team

Filters

^ Display
All reports
Direct reports

^ Manager Type
 Line manager

^ Worker Type
 Contingent worker
 Employee
 Nonworker
 Pending worker

^ Assignment Type
 Nonprimary
 Primary

^ Assignment Status
 Active
 Suspended

^ Job