

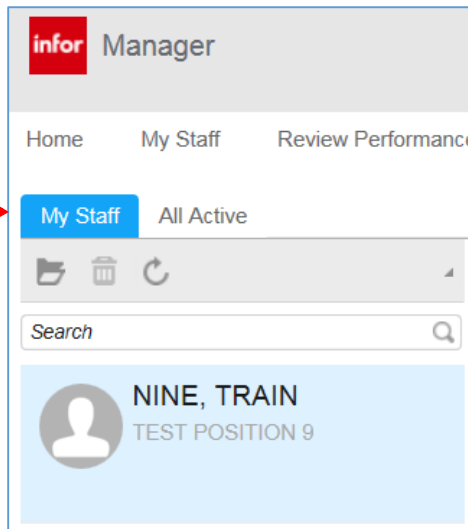
TALENT MANAGEMENT QUICK REFERENCE GUIDE - MANAGER

HOW TO RATE YOUR EMPLOYEE AND SUBMIT APPRAISAL TO UPLINE MANAGER

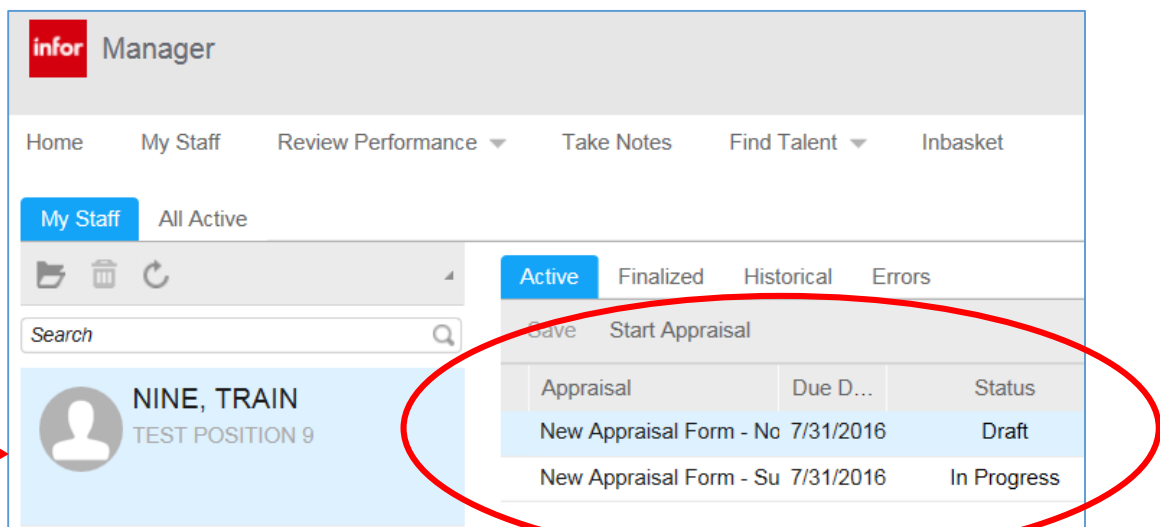
Before proceeding, make sure your employee has an appraisal created for the current appraisal period.

Manager Completes the Performance Appraisal

1. After you **log into MAP**, you will find a listing of your employees' names on the left portion of the screen under the **My Staff** tab.



2. **Click** on the employee's name to display the employee's active appraisals on the right part of the screen:



- a. **Double-click** on the proper appraisal by confirming the Appraisal Name, Period Begin, and Period End Dates.

Appraisal	Due Date	Status	Appraisal Owner	Period...	Period...	Estimated %...
New Appraisal Form - Non Supervi	7/31/2016	Draft	FOUR, TRAIN	7/1/2015	6/30/2016	0 %
New Appraisal Form - Supervisor	7/31/2016	In Progress	FOUR, TRAIN	7/1/2015	6/30/2016	20 %

3. You are now at the Main Page of the Employee’s Appraisal. The page displays employee’s data such as name, review period, and the due date of the review. This page also allows you to review the instructions for evaluating the competencies, upload attachments that are relevant to the review, document notes throughout the review period, print a consolidated appraisal, review the employee’s self-appraisal, and view historical appraisals.

TRAIN NINE- Performance Appraisal: New Appraisal Form - Supervisor

Continue Appraisal Finalize Notify Resource Update Overall Rating

TRAIN NINE - TSTPOS9
Performance Review Period: 7/1/2015 - 6/30/2016
Please Complete By: 7/31/2016
Estimated % Complete: 20 %
Appraisal Owner: 4 TRAIN FOUR

If the appraisal is not complete, click Continue Appraisal. If the appraisal is complete, click Finalize.

[Competencies & Standards](#) | [Attachments](#) | [Take Notes](#) | [Consolidated Appraisal](#) | [Self Appraisal](#) | [Historical Appraisals](#)

Appraisal Status

Document Owner	Appraisal Owner	Supervisor	Status	Estimated % Complete
Manager	FOUR, TRAIN	FOUR, TRAIN	In Progress	20 %
Employee	NINE, TRAIN	FOUR, TRAIN	Draft	0 %

Records Per Page: 10

4. Below are brief instructions for each of these sections:


- a. **Competencies & Standards**

New Appraisal Form - Supervisor Instructions

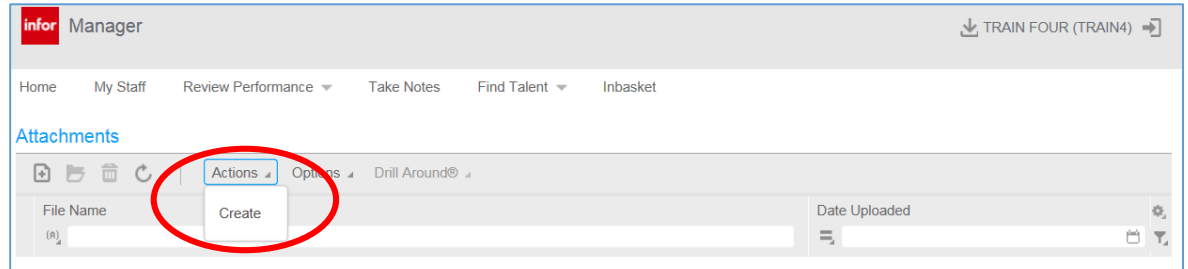
Performance Management Evaluation Form
Please click on the appropriate competency below to review the description and standards.



Statewide Competencies
Customer Service
Accountability
Teamwork and Cooperation
Leadership and Supervision

Agency Specific Competencies
Communication
Conflict Management
Correctional Safety and Safety Functions
Creativity and Innovation
Flexibility

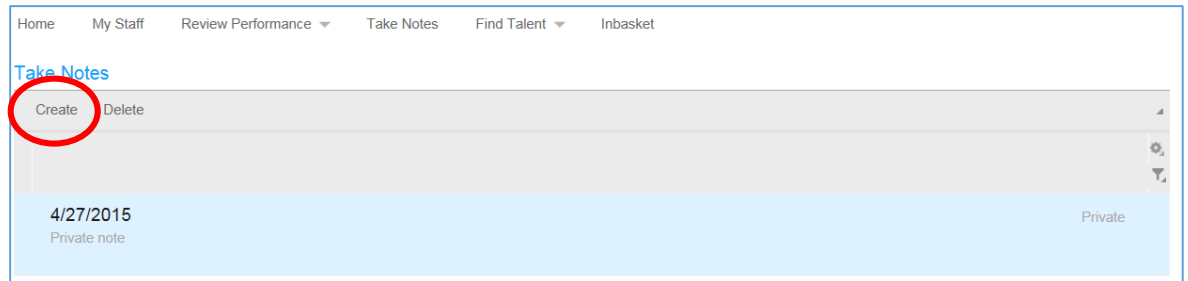
- i. Click on the **Competencies & Standards** link.
- ii. An Adobe Acrobat PDF document will appear with a list of all competencies.
- iii. You can click on any competency to view the competency description and standards associated with that particular competency. The agency specific competencies section lists all available competencies. Please contact your Supervisor or HR Manager to review your division competency packet.
- iv. To return to the appraisal, click the **Back**  button in your browser.

b. Attachments





- i. Click on the **Attachments** link.
- ii. To add an attachment, click on the **Actions** link and then click **Create**.
- iii. Click on **Folder**, then **Browse** for the attachment on your computer.
- iv. **Highlight** the file you want to upload and then click **Open**.
- v. Click the **Save icon**  on upper left of the toolbar.
- vi. To return to the appraisal, click the **Back**  button in your browser.

c. Take Notes



- i. Click on the **Take Notes** link.
- ii. Click **Create**.
- iii. The current date will automatically default in the date field. If you wish to enter a different date, you can type it in or select the date by clicking on the calendar icon.
- iv. Type the information you want to document in the **Note** provided.
- v. Check the **Public** checkbox (if you want your employee to review the note) otherwise leave the box unchecked and the note will remain private to you.

- vi. To add an **Attachment**, click on the  **Folder Icon**, to browse for the attachment on your computer and then click **Open**.
- vii. Click **OK** to save the note and/or the uploaded document.
- viii. To return to the appraisal, click the **Back**  button in your browser.

d. Consolidated Appraisal

New Appraisal Form - Supervisor for TRAIN NINE

Performance Review Period: July 1, 2015 - June 30, 2016

Performance Management Evaluation Form

Employee Information

Employee: 9 TRAIN NINE

Organization Unit: DE133-13310


Position: TSTPOS9

Supervisor Name: TRAIN FOUR

Start Date: 01/01/2015

Statewide Competencies

Accountability - Accepts full responsibility for self and contribution as a team member; displays honesty and truthfulness; addresses problems quickly; displays a strong commitment to organizational success and inspires others to commit to goals; demonstrates a commitment to delivering on his/her public duty and presenting oneself as a credible representative of the agency to maintain the public's trust.

- i. To view the Appraisal, click on the **Consolidated Appraisal** link.
- ii. The entire appraisal will open into an Adobe Acrobat PDF.
- iii. To return to the appraisal, click the **Back**  button in your browser.

e. Self-Appraisal

Infor Manager TRAIN FOUR (TRAIN4)


Home My Staff Review Performance Take Notes Find Talent Inbasket

Self Appraisal

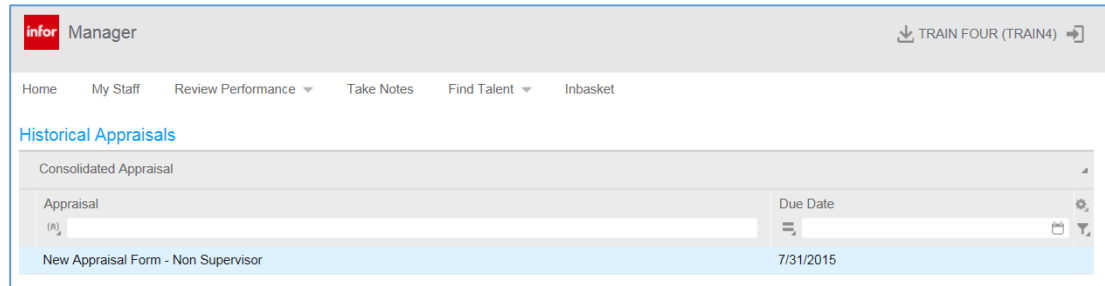
Appraisal


Name	Appraisal
(A)	(A)

- i. If your direct report has completed a self-appraisal, you may view it here by clicking on the **Self-Appraisal** link and then click on the Appraisal link in the upper left corner.
- ii. You may also view the Self-Appraisal through the Consolidated Appraisal link once the employee has finalized their self-appraisal.
- iii. If your direct report has NOT completed a self-appraisal, there will be nothing displayed.

iv. To return to the appraisal, click the **Back**  button in your browser.

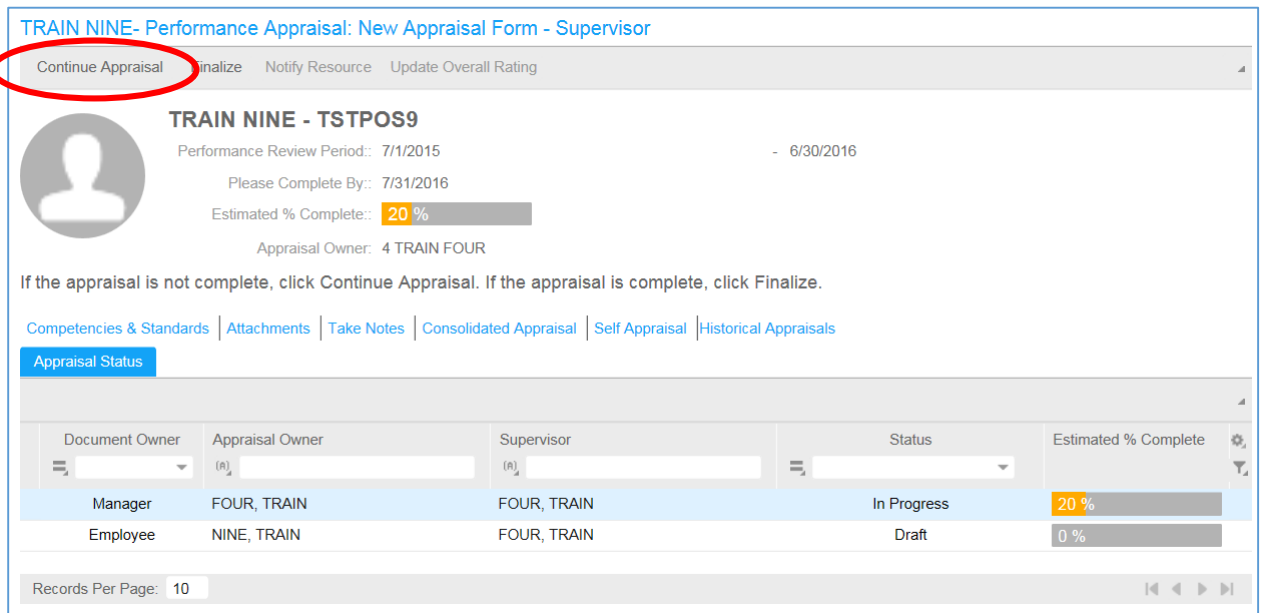
f. Historical Appraisals



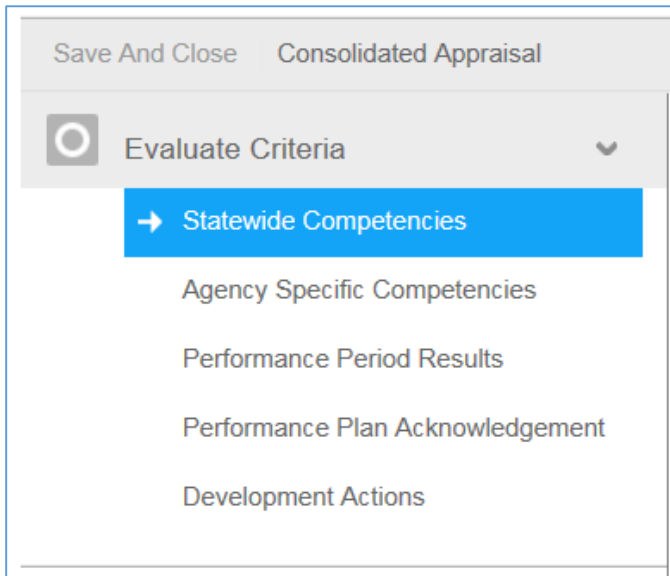
- i. All appraisals that have been finalized and acknowledged (by employee and supervisor) will appear in this list.
- ii. Once an appraisal has been moved to the Historical section, there can be no further editing on the document.
- iii. To view an appraisal, single click the appraisal, then click **Consolidated Appraisal**.
- iv. To return to the appraisal, click the **Back**  button in your browser.

Performance Appraisal – Complete Ratings and Comments

- 1. To begin the appraisal, click **Continue Appraisal** on the Main Page of the Employee’s Appraisal (upper left corner).



2. Below are brief instructions for each section of the employee’s appraisal.



- a. **Statewide Competencies:** There are **three** statewide competencies for the non-supervisory positions and **four** statewide competencies for supervisory positions.

1 Accountability - Accepts full responsibility for self and contribution as a team member; displays honesty and truthfulness; addresses problems quickly; displays a strong commitment to organizational success and inspires others to commit to goals; demonstrates a commitment to delivering on his/her public duty and presenting oneself as a credible representative of the agency to maintain the public's trust.

Needs Improvement
 Meets Expectations
 Exceeds Expectations

Comments:

*** Use the keyboard command Ctrl + V to paste from a document ***

2 Customer Service - Understands that all employees have external and/or internal customers and stakeholders that they provide services and information to; honors all of the agency's commitments to customers by providing helpful, courteous, accessible, responsive, and knowledgeable service.

Needs Improvement
 Meets Expectations
 Exceeds Expectations

- i. Review each competency and compare the employee’s performance against the standards associated with that particular competency (found under the Competencies & Standards link).

- ii. You should also review the employee’s MAP Planner to refresh your memory on what specific tasks or metrics you will be evaluating the employee on.
 - iii. Once you have reviewed the Statewide competency standards, **select your rating** for each competency by clicking on the appropriate rating:
 - 1. Needs Improvement
 - 2. Meets Expectations
 - 3. Exceeds Expectations
 - iv. Enter your **Comments** supporting the ratings you have chosen for each competency.
 - v. Click the **Next** link on the bottom of the page to save your responses.
- b. **Agency Specific Competencies:** There are three agency specific competencies for each position. Review each competency and compare the employee’s performance against the standards associated with that particular competency (found under the Competencies & Standards link).

1 Accountability - Accepts full responsibility for self and contribution as a team member; displays honesty and truthfulness; addresses problems quickly; displays a strong commitment to organizational success and inspires others to commit to goals; demonstrates a commitment to delivering on his/her public duty and presenting oneself as a credible representative of the agency to maintain the public's trust.

Needs Improvement
 Meets Expectations
 Exceeds Expectations

Comments:

*** Use the keyboard command Ctrl + V to paste from a document ***

2 Communication - Respectfully listens to others to gain a full understanding of issues; comprehends written material; presents information in a clear and concise manner orally and in writing to ensure others understand his/her ideas; appropriately adapts his/her message, style, and tone to accommodate a variety of audiences.

Needs Improvement
 Meets Expectations
 Exceeds Expectations

Previous
Next

- i. Once you have reviewed the Agency Specific competency standards, **select your rating** for each competency by clicking on the appropriate rating.
- ii. If the agency specific competencies are not listed and the message **‘NO DATA TO DISPLAY’** is listed, please contact the HRIS Help Desk before proceeding any further.

- iii. Enter your **Comments** supporting the ratings you have chosen for each competency.
 - iv. Click the **Next** link on the bottom of the page to save your responses.
- c. **Performance Period Results:** This is the section that was completed during the Performance Planning phase.

1 RESULTS ORIENTATION: Consistently delivers required business results; sets and achieves achievable, yet aggressive, goals; consistently complies with quality, service and productivity standards and meets deadlines; maintains focus on agency goals.

Needs Improvement Meets Expectations Exceeds Expectations

Comments:

*** Use the keyboard command Ctrl + V to paste from a document ***

Enter SMAART Objectives or Overall Section Comments:

*** Use the keyboard command Ctrl + V to paste from a document ***

SMAART Objectives for EMPLOYEE NAME
HERE:

[Previous](#) [Next](#)

- i. You must evaluate the SMAART Objectives (if any were created for this rating period) as well as the standard Results Orientation competency and **select your rating** for this section.
- ii. Enter your **Comments** supporting the rating you have chosen for SMAART Objectives and the Results Orientation competency in the **COMMENTS** section (not OVERALL COMMENTS section).
- iii. Click the **Next** link on the bottom of the page to save your responses.

- d. **Performance Plan Acknowledgement:** This section was completed during the Performance Planning phase. No action is needed at this time in this section.

1 Performance Plan Acknowledgement

Selecting "Yes" below indicates that the supervisor and employee have discussed the performance plan and that the discussion included review of the competencies, performance period results and work standards upon which the employee will be evaluated.

Yes No

Comments:

*** Use the keyboard command Ctrl + V to paste from a document ***


[Previous](#) [Next](#)

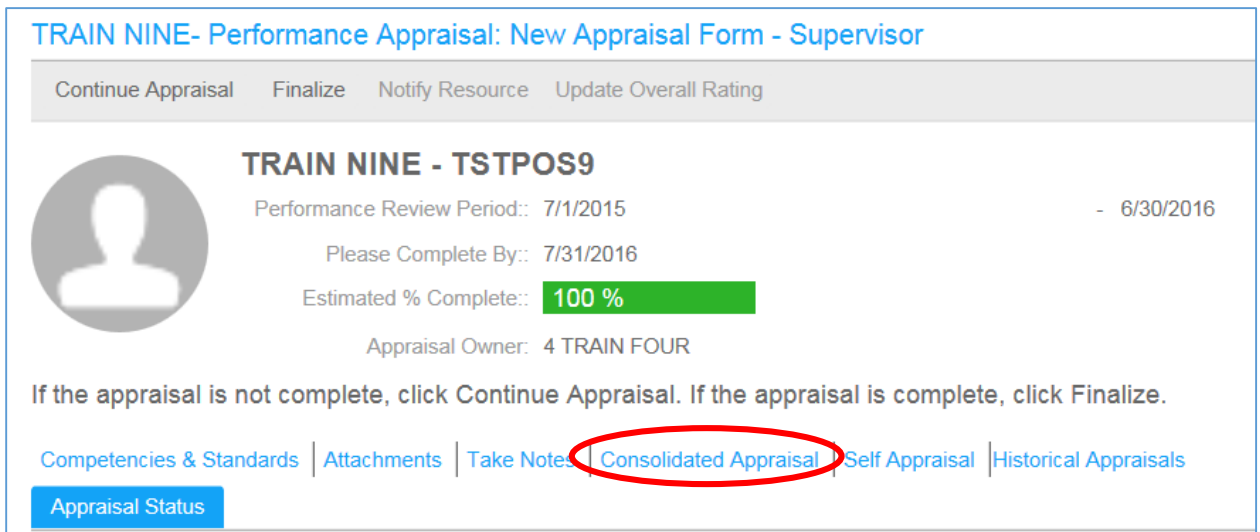
- e. **Development Actions:** This section may have been completed during the Performance Planning phase.

1 Learning and Development:

Enhance your supervisor skills by taking Leadership Academy training.]

[Previous](#) [Finish](#)

- i. No action is needed at this time in this section unless the section is still blank which in that case you will need to enter a **comment** since this section is required. (You may enter N/A if there are no development actions at this time).
 - ii. Once completed with all steps, click **Finish** (button is found at bottom of screen) or click the **Back**  button in your browser.
3. If you wish to view the appraisal, click the **Consolidated Appraisal** link.



TRAIN NINE- Performance Appraisal: New Appraisal Form - Supervisor

Continue Appraisal Finalize Notify Resource Update Overall Rating

TRAIN NINE - TSTPOS9
Performance Review Period:: 7/1/2015 - 6/30/2016
Please Complete By:: 7/31/2016
Estimated % Complete:: **100 %**
Appraisal Owner: 4 TRAIN FOUR

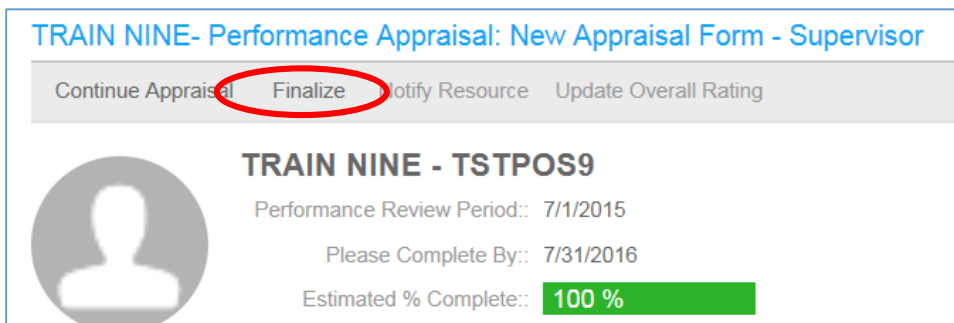
If the appraisal is not complete, click Continue Appraisal. If the appraisal is complete, click Finalize.

Competencies & Standards | Attachments | Take Note | **Consolidated Appraisal** | Self Appraisal | Historical Appraisals

Appraisal Status

Finalize the Performance Appraisal

1. Once the review is completed, click **Finalize** in the upper left corner.



TRAIN NINE- Performance Appraisal: New Appraisal Form - Supervisor

Continue Appraisal **Finalize** Notify Resource Update Overall Rating

TRAIN NINE - TSTPOS9
Performance Review Period:: 7/1/2015
Please Complete By:: 7/31/2016
Estimated % Complete:: **100 %**

2. A new dialog box will appear. Click the **OK** button to confirm.

Finalize Appraisal

If you are **SATISFIED** with the appraisal, you must complete the following two steps:

1. Click **Ok**
2. Click **SUBMIT TO UPLINE**

If you do not complete both steps, the appraisal will not be sent to your upline manager.

If you wish to **MODIFY** the appraisal before sending it to your manager for review, click **OK** below.
Next double click the Appraisal Form, and click **Revert to In Progress**.

OK Cancel

PLEASE NOTE: Finalize does NOT Submit to the Upline Manager and does NOT mean the appraisal process is complete. Continue to next step.

3. Click **Submit To Upline Manager**.

TRAIN NINE- Performance Appraisal: New Appraisal Form - Supervisor

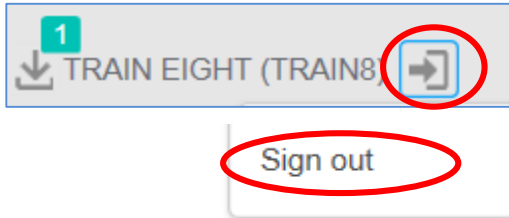
Revert To In Progress Notify Resource Update Overall Rating **Submit To Upline Manager**

TRAIN NINE - TSTPOS9
Performance Review Period: 7/1/2015 - 6/30/2016
Please Complete By: 7/31/2016
Overall Rating: Meets Expectations
Estimated % Complete: **100 %**
Appraisal Owner: 4 TRAIN FOUR

4. You are now ready to discuss the employee's appraisal with your Upline Manager. You must do this **before** you share it with the employee.

i Submit To Upline Manager Completed Successfully
Submit To Upline Manager Completed

5. Once the Upline Manager Approves the appraisal, you may share it with your employee.
6. To **log out of MAP**, click the Arrow next to your name in the upper right hand corner and then select **Sign Out**.



If you have any questions regarding MAP, please contact your Human Resources Department.