

TALENT MANAGEMENT QUICK REFERENCE GUIDE - MANAGER

HOW TO CREATE A NEW APPRAISAL AND EMPLOYEE PLANNER

Appraisal Auto Creation

Appraisals will now be created for employees based on the following information:

- Appraisals will be created based on the review periods the agency has listed in HRIS.
- The new appraisals will be auto created on the evening of the Appraisal Begin Date.
- Newly hired employees may need to wait up to 7 days after they were initially entered into HRIS, for their appraisal to be created.
- Interagency transfer employees may need to wait up to 7 days after they were initially entered into HRIS, for their appraisal to be created.

Exceptions

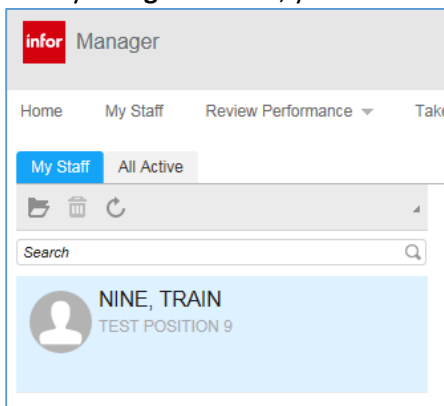
Appraisals **will not** be created for the following employees:

- Board and Commission Members (HRIS Status Code - F1)
- Correctional Officer I positions (Job Code - ACV39002)
- Elected Officials and their direct reports (HRIS Status Code - E1 & E2 or by Supervisor Code)
- Temporary or Seasonal employees (HRIS Status Code - D1, D2)
- Any position designated as, or reports to a "Political Appointment."
- Any position that does not have Competencies loaded in the MAP position record, will require an appraisal to be manually created.

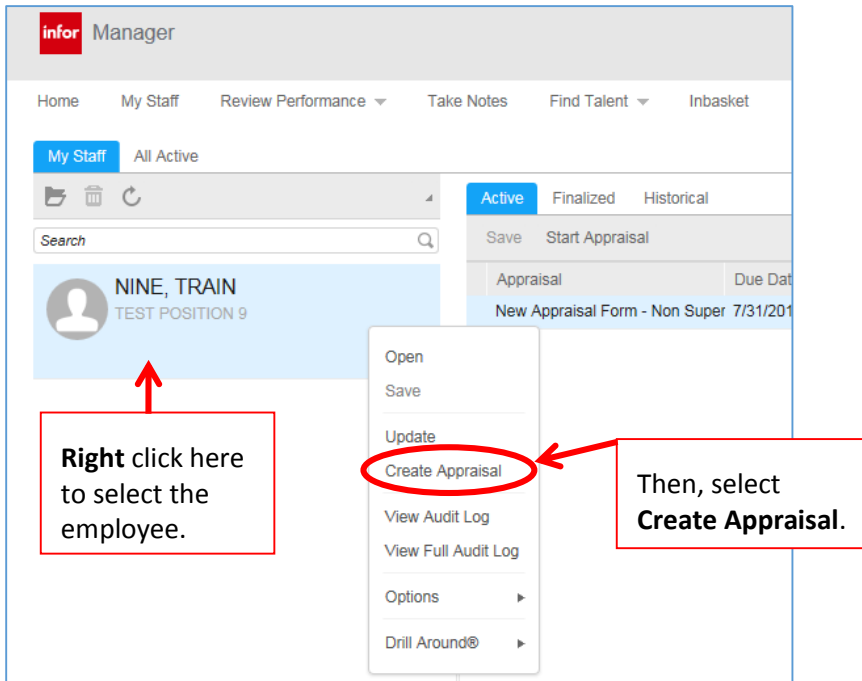
New appraisals should be manually created when one of the Exceptions occurs as listed above:

Manager Creates New Appraisal

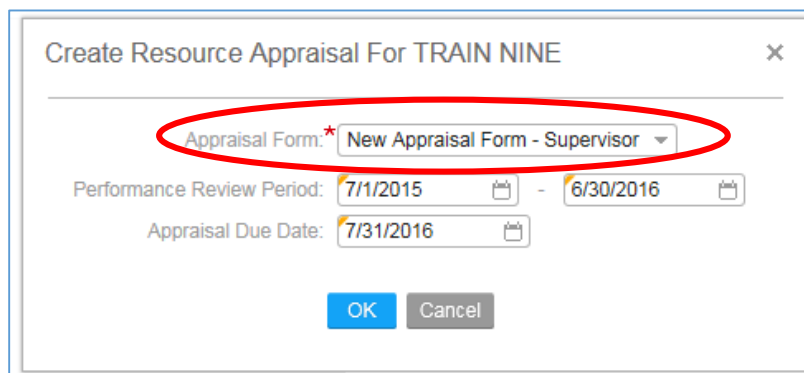
1. After you **log into MAP**, you will be directed to a listing of your employees' names.



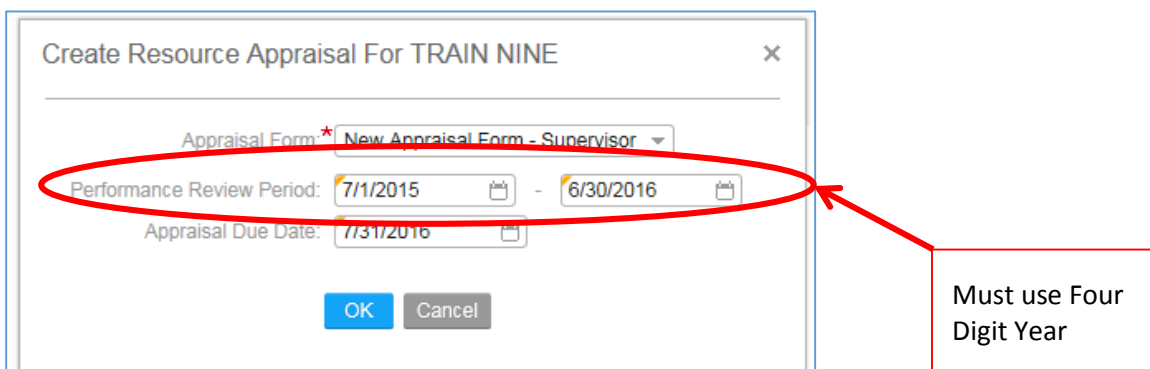
2. **Right click** on employee under **My Staff** and click on **Create Appraisal**. (If the employee's name does not appear under **My Staff**, please contact the HRIS Help Desk.)



3. **Select the Appraisal Form** - your options will be as follows:
 - a. New Appraisal Form – Non Supervisor (select if the employee **does not** supervise)
 - b. New Appraisal Form – Supervisor (select if the employee **does** supervise employees)



4. Enter the **Performance Review Period Start and End Dates** (must use the four digit year).



Please be advised: The Performance Period End Date **may not** align with your agency's Annual Appraisal Cycle, see below for specific information.

- a. Uncovered Employee or Covered Employee with Permanent Status
 - i. Date should equal the end of the agency's Annual Appraisal Cycle unless there are less than three months remaining.
 - ii. If there are less than three months remaining, the Performance Review Period end date should skip the upcoming Annual Appraisal Cycle end date and instead should equal the Annual Appraisal Cycle end date one year later (e.g., if an agency is on a January 1 through December 31 cycle, and the employee is hired on October 15th 2015, the end date of the employee's appraisal period should be December 31, 2016, not December 31, 2015).
- b. Covered Employee / Promotional Probation
 - i. Date should equal six months from date of promotion.
- c. Covered Employee / Original Probation
 - i. Date should equal one year from date of appointment to the covered position.

If you are unsure of the proper date or have any questions, please contact your agency's Human Resources office.

5. **Enter the Appraisal Due Date.**

- a. This date will be the last day of the month following the Annual Appraisal Cycle End Date **UNLESS** the employee is on Promotional Probation or Original Probation. In those cases, the Appraisal Due Date is thirty days before the last day of probation.

Appraisal Due Date: 7/31/2016

OK Cancel

6. Click the **OK** button.

Appraisal Due Date: 7/31/2016

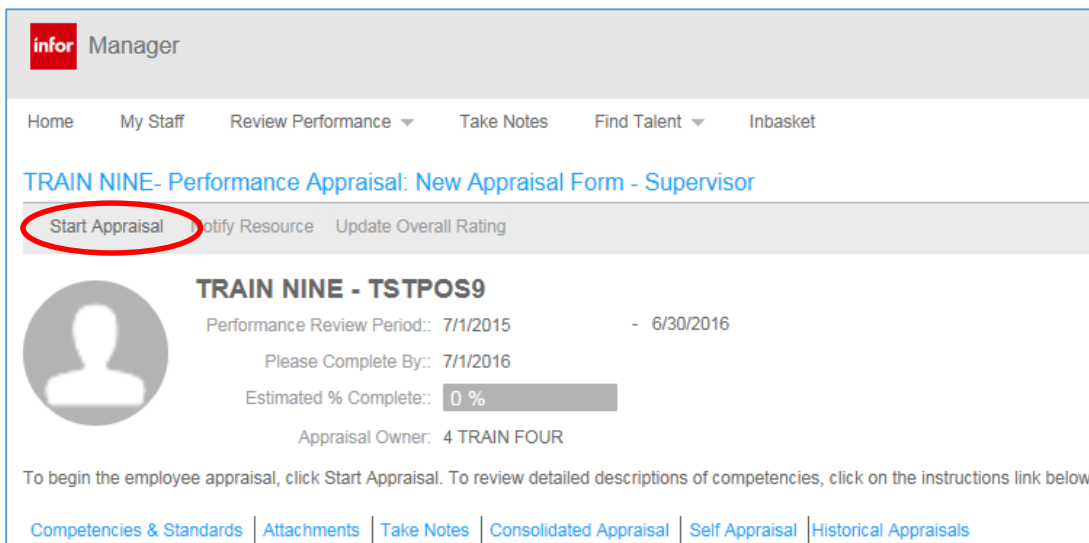
OK Cancel

Manager Creates and Acknowledges the Performance Plan

1. **Double click** on the employee's appraisal to the right:
 - a. Please make sure you select the proper appraisal by confirming the Appraisal Name and Period Begin and Period End Dates.

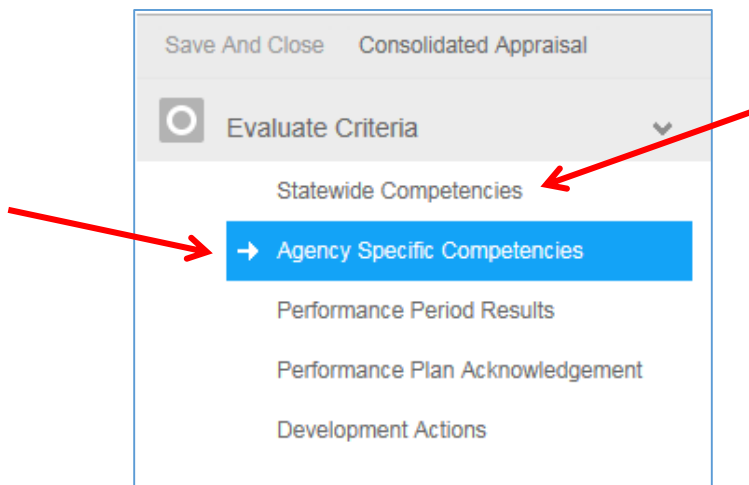
Appraisal	Due Date	Status	Appraisal Owner	Period B...	Period End	Estimated % Co...
New Appraisal Form - Non Supervisor	7/31/2016	Draft	FOUR, TRAIN	7/1/2015	6/30/2016	0 %
New Appraisal Form - Supervisor	7/31/2016	Draft	FOUR, TRAIN	7/1/2015	6/30/2016	0 %

2. Click on **Start Appraisal**. If you already began the appraisal, click **Continue Appraisal**.



The screenshot shows the Infor Manager interface for a manager. The breadcrumb trail is: Home > My Staff > Review Performance > Take Notes > Find Talent > Inbasket. The main heading is "TRAIN NINE- Performance Appraisal: New Appraisal Form - Supervisor". Below this, the "Start Appraisal" button is circled in red. Other buttons include "Notify Resource" and "Update Overall Rating". The employee information section shows "TRAIN NINE - TSTPOS9" with a performance review period from 7/1/2015 to 6/30/2016, a completion deadline of 7/1/2016, and an estimated completion of 0%. The appraisal owner is listed as "4 TRAIN FOUR". At the bottom, there are links for "Competencies & Standards", "Attachments", "Take Notes", "Consolidated Appraisal", "Self Appraisal", and "Historical Appraisals".

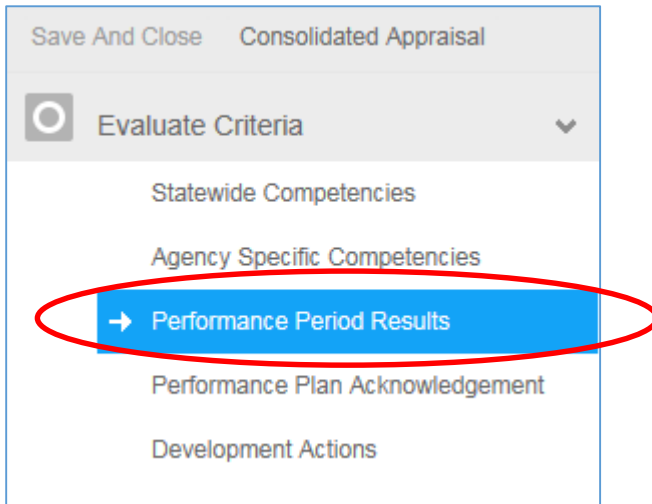
3. Click **Statewide Competencies** or **Agency Specific Competencies** to review competencies.



The screenshot shows a dropdown menu titled "Evaluate Criteria". The menu items are: "Statewide Competencies", "Agency Specific Competencies" (highlighted in blue), "Performance Period Results", "Performance Plan Acknowledgement", and "Development Actions". Red arrows point to the "Statewide Competencies" and "Agency Specific Competencies" options.

- a. If the message '**NO DATA TO DISPLAY**' is listed, please contact the HRIS Help Desk before proceeding any further.

4. Click **Performance Period Results**.



5. Input SMART Objectives for the employee in the **Overall Section Comments** box.

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 SMART Objectives or Overall Section Comments:

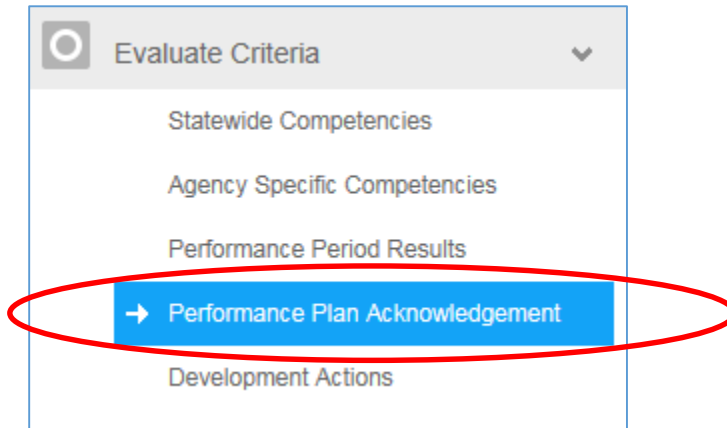
*** Use the keyboard command Ctrl + V to paste from a document ***

SMART Objectives for EMPLOYEE NAME HERE:

1. SMART Goal # 1
2. SMART Goal # 2
3. SMART Goal # 3

- a. Employees cannot view the Results from the appraisal. Therefore, you must transmit the SMART Objectives to the employee in some other manner (e.g., email, Word document, Take Notes function, etc.).
- b. If you are using a method other than **Take Notes**, proceed to step 6. If you want to use the **Take Notes** feature to transmit the SMART Results to the employee, follow the instructions below.
- c. Highlight the SMART Objectives that you entered in the Overall Comments Box. Press "Ctrl C" on your keyboard to copy the Results so that you can paste them into a Note after you have completed the rest of this process.

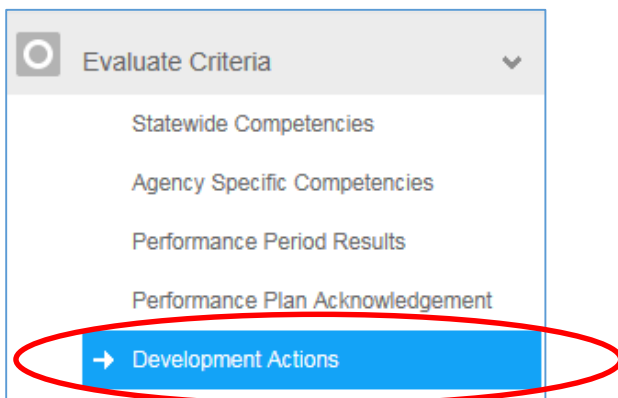
6. Click **Performance Plan Acknowledgement** and read the acknowledgement statement.



7. Click **Yes** after it has been ensured you have complied with the requirements of the acknowledgement statement.

A screenshot of a web form titled '1 Performance Plan Acknowledgement'. The form contains a paragraph of text: '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.' Below this text are two radio buttons: 'Yes' and 'No'. The 'Yes' radio button is selected and circled in red. Below the radio buttons is a 'Comments:' section with a text area. A note above the text area reads: '*** Use the keyboard command Ctrl + V to paste from a document ***'. The text area is currently empty.

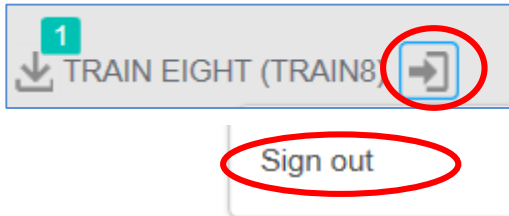
8. Click **Development Actions**. The development actions section should be used to record key development activities the supervisor and employee identify in their planning that will directly lead to improved employee performance during the appraisal cycle.



9. Click the **Finish** button.



10. 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.