

# myPerformance Evaluator Guide

---



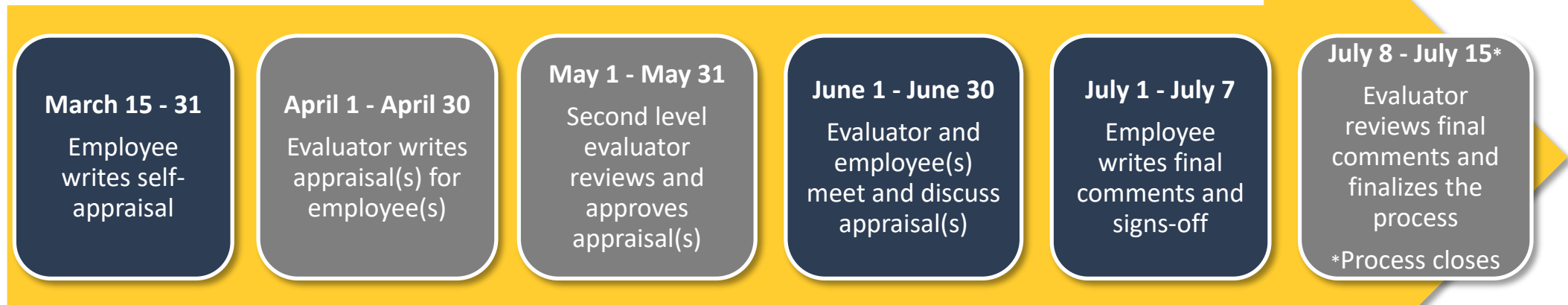
University of Missouri System

COLUMBIA | KANSAS CITY | ROLLA | ST. LOUIS

# Overview: myPerformance Workflow

- Takes place March 15<sup>th</sup> – July 15<sup>th</sup>
- Step deadlines are consistent across the system
- Email notifications are sent at each new step and as deadlines are approaching

## Basic steps of myPerformance:



# Overview: FY19 Appraisal Forms

Appraisal forms for all employees consist of the following rated criteria:

- Success Factors
  - Accountability
  - Collaboration
  - Communication
  - Customer Focus
  - Diversity & Inclusion
  - Judgment
  - Time Management
- One optional fill in the blank section (non-union eligible) or Pre-populated Key Responsibilities (union eligible)
  - Equally weighted
  - Can be used to capture another competency, job duty, or as a summary of overall goal completion to name just a few options

Evaluators and employees will be required to provide one summary comment.



# Overview: FY19 Appraisal Forms

- Appraisal forms continue to be assigned based on the job title's subfunction within the organization
  - Union Eligible
    - Food Service Worker II, Power Plant Electrician
  - Support Task Expert
    - Office Support Assistant I, Student Recruitment Specialist
  - Subject Matter Professional
    - Instructional Designer, Advancement Officer
  - Management
    - Manager II Student Support Services, Associate Registrar
  - Leadership
    - Director II Finance, Director IT



# Overview: Scaled Success Factor Example

**COMMUNICATION:** *Provides information clearly and accurately in various settings, ensuring understanding and participation.*

**Definition is the same for all**

## Union-Eligible

- Documents work clearly, correctly, and completely using the appropriate method
- Exchanges information in a straightforward, clear manner; changes tone and message as necessary
- Demonstrates thoughtfulness and attention when listening to others, responding appropriately to questions

## Leadership

- Communicates highly complex or unusual circumstances appropriately, ensuring that content is shared and understood at all function/department levels
- Uses a variety of communication tactics/ methods and adjusts messages and tone to more effectively communicate to various function/department levels
- Models and encourages others to actively listen, allow for questions and discussion, and reflect on key messages, while ensuring stakeholders has a chance to provide input


**Behavioral descriptions vary by subfunction**



# Overview: Rating Scale and Overall Score

- Each component of the appraisal is rated on a five point scale
  - Outstanding
  - Exceeds Expectations
  - Successful
  - Improvement Expected
  - Unacceptable
- Overall Scores are based on the calculated average
- The detailed rating scale is available on the first page of the appraisal for reference

\*Indicates required field

  
Support Task Expert Performance Appraisal FY19

Demographics

Name:  Employee ID:

Job Title:  Supervisor:

Department:

General Instructions

The annual Performance Appraisal is intended to summarize employee performance over the past year and provide an opportunity to plan for the coming year. Use the rating scale definitions below to help accurately document performance. Use the comment box at the end of the appraisal to provide specific examples that support your ratings. An overall comment must be provided.

Rating Scale

**Outstanding**  
Is a role model in the job. Exhibits mastery in all facets of the job. Puts the customer at the center of every activity. Steps outside of existing responsibilities to add value to the University. Identifies breakthrough concepts. Is sought out by colleagues for advice on issues. Models the values of the University on a daily basis. Is in sync with the strategic direction of the University. Is universally regarded by others as a knowledgeable resource and true asset. Acts as a mentor, guide and teacher. Seeks new and improved ways to perform the job. Openly shares information and resources. Actively promotes cooperation, understanding and teambuilding.


**Exceeds Expectations**  
Performance consistently exceeds expectations in specified criteria. Sets and meets challenging professional goals and shows initiative in meeting them. Assumes extra responsibilities and participates in projects often. Proactive in planning, problem solving and initiating solutions within work group. An exceptional contributor to the success of the work group and organization.

**Successful**  
Performance consistently meets expectations in specified criteria. Requires minimal supervision and complies with work rules and regulatory requirements. Performance consistently meets the demands placed upon the position. Reliably completes routine assignments in an accurate and timely fashion. Assumes additional responsibilities when requested or assists in extra project work. Meets the University's high performance standards. Contributes positively to the success of the work group and organization.

**Improvement Expected**  
Performance meets some but not all expectations in specified criteria. Performance requires occasional supervisory intervention. Does not consistently complete job assignments in some areas in an accurate and timely fashion. Performance or behavior causes occasional problems for students, customers, department/unit and/or co-workers.

**Unacceptable**  
Overall performance does not meet expectations in specified criteria. Often requires supervision, redirection and/or re-instruction. Does not consistently complete job assignments in an accurate and timely fashion. Performance or behavior causes problems for students, customers, department/unit and/or co-workers.

1/5



# Drafting the Appraisal

---

# Tip: Writing the Appraisal

## Things to Consider:

- Goals, manager notes, development plans, past appraisals, documents, and journal notes
- Progressive discipline (if any) and other historical performance information
- Specific examples that support your ratings
- Read the Rating Scale definitions before starting the review and read the behavior statements for each success factor before considering a rating
- Ratings should reflect the entire year's performance—not just the most recent or significant events





# Access: myPerformance

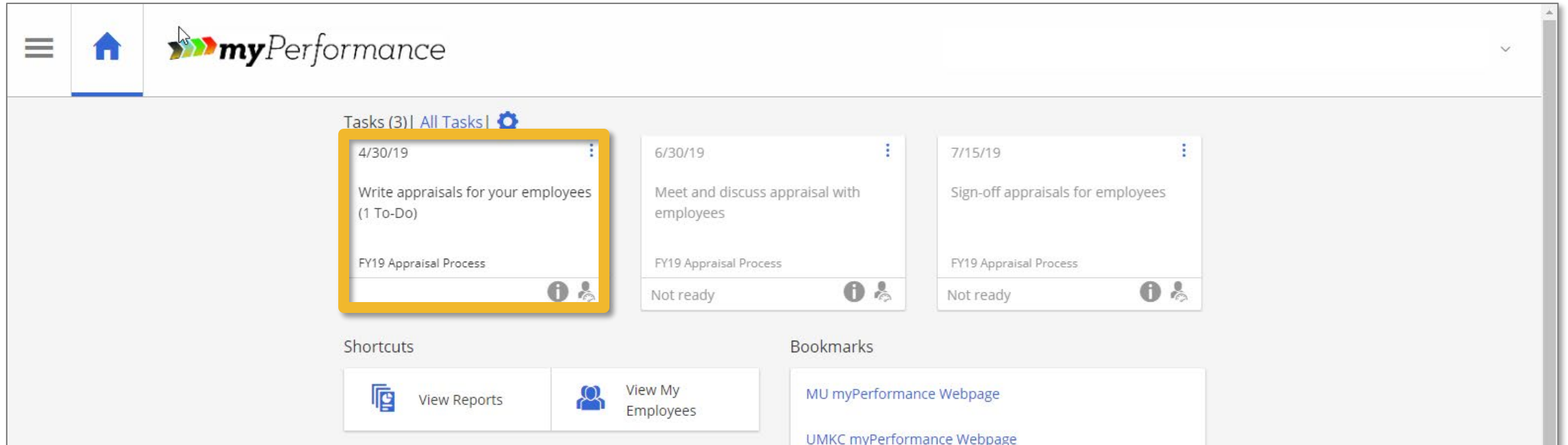
- From myHR, choose the **Training & Performance** tile
- Log in to myPerformance using your single sign on

The screenshot displays the 'myHR: Employee Self Service' interface. At the top, there is a navigation bar with a home icon, a search icon, a menu icon, and a refresh icon. Below the navigation bar, the text 'UM SYSTEM' is prominently displayed. The main content area is a grid of eight tiles, each representing a different HR function. The tiles are: 'Benefits' (with a heart and money bag icon), 'Careers' (with a magnifying glass over the word 'JOB'), 'Time' (with a person and clock icon), 'Personal Details' (with a document and pencil icon), 'Payroll' (with a stack of money icon and the text 'Last Pay Date 02/28/2019'), 'Employee Actions' (with the University of Missouri seal), 'Additional Employee Info' (with a document and pencil icon), and 'Training & Performance' (with a stack of books and an apple icon). The 'Training & Performance' tile is highlighted with a yellow border. In the bottom right corner, there is a refresh icon and the University of Missouri seal.



# Access: Your Tasks

- From the **Home** screen, click on one of the tasks needing completion



The screenshot displays the myPerformance Home interface. At the top left, there is a navigation bar with a home icon and the myPerformance logo. Below this, the main content area is titled "Tasks (3) | All Tasks | [gear icon]". Three task cards are visible, each with a due date and a description:

- 4/30/19**: Write appraisals for your employees (1 To-Do). FY19 Appraisal Process. Status: Not ready.
- 6/30/19**: Meet and discuss appraisal with employees. FY19 Appraisal Process. Status: Not ready.
- 7/15/19**: Sign-off appraisals for employees. FY19 Appraisal Process. Status: Not ready.

Below the tasks, there are two sections: "Shortcuts" and "Bookmarks".

**Shortcuts:**

- View Reports (with a document icon)
- View My Employees (with a person icon)

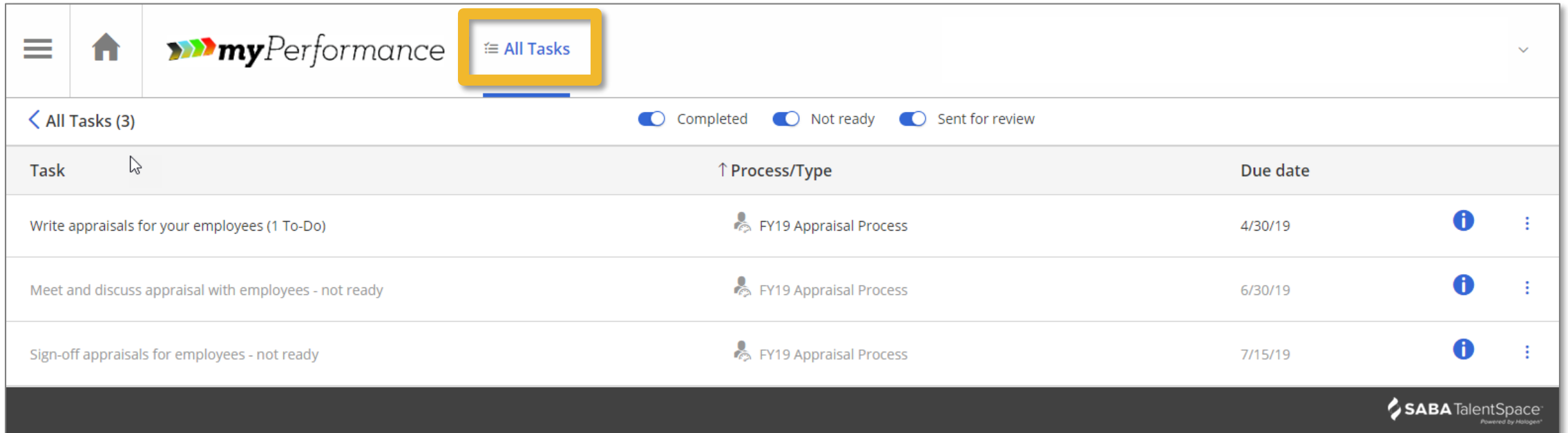
**Bookmarks:**

- MU myPerformance Webpage
- UMKC myPerformance Webpage



# Access: Your Tasks

- Or click **All Tasks** to see everything you have pending and their due dates
- Click on one of the tasks



myPerformance [All Tasks](#)

< All Tasks (3)  Completed  Not ready  Sent for review

Task	Process/Type	Due date		
Write appraisals for your employees (1 To-Do)	FY19 Appraisal Process	4/30/19	i	⋮
Meet and discuss appraisal with employees - not ready	FY19 Appraisal Process	6/30/19	i	⋮
Sign-off appraisals for employees - not ready	FY19 Appraisal Process	7/15/19	i	⋮

SABA TalentSpace  
Powered by Halogen



# Access: An Employee's Appraisal

- Find the employee you wish to evaluate and click **Edit Appraisal** next to their name

Write appraisals for your employees ✕

« | Page  of 1 | » Displaying 1 - 1 of 1

Employee Name ▲	Task
Haley zzz-halogenEmployee	<input type="radio"/> Edit Appraisal

Close



# Appraisal: The Form

- Use the **Form Navigator** to specific sections, such as Rating Scale or Success Factors
- Use the buttons across the top to **Save Changes**, **Submit**, or send for **Third Party Review**

The screenshot shows the 'myPerformance' interface for a 'Management Performance Appraisal FY19'. At the top, there are utility icons for Print, Spelling, Check, Employee Records, and Appraisals. On the right, three action buttons are highlighted: 'Save Changes', 'Submit', and 'Third Party Review'. On the left, a 'Form Navigator' dropdown menu is open, listing various sections: Management Performance Appraisal Form, Demographics, General Instructions, Rating Scale, Success Factors (with sub-items: Accountability, Collaboration, Communication, Customer Focus, Diversity & Inclusion, Judgment, Time Management, Fill in the blank (optional)), Overall Rating (with sub-item: Supporting Comments), New Performance Goals (optional), Employee Acknowledgment, and Employee Final Comments. The main form content includes a 'Demographics' section with fields for Name (Haley zzz-halogenEmployee), Employee ID, Job Title (Support Analyst), Supervisor (HalManager), and Department. Below this is the 'General Instructions' section, which states: 'The annual Performance Appraisal is intended to summarize employee performance over the past year and provide an opportunity to plan for the coming year. Use the rating scale definitions below to help accurately document performance. Use the comment box at the end of the appraisal to provide specific examples that support your ratings. An overall comment must be provided.' The 'Rating Scale' section is partially visible at the bottom, showing 'Outstanding'.



# **Third Party Review (Optional)**

---

# Third Party Review: Assignment

- If you would like to get feedback from another person, click on the button **Third Party Review** (top right)
- Search for the name, highlight, and click **Send**
- This can be done before or after you have started drafting

The screenshot shows a web application interface for assigning a Third Party Review. A modal window titled "Third Party Review (optional)" is open, allowing the user to select an employee. The modal contains the following fields and options:

- Select the employee to perform the review.**
- Last Name:
- First Name:
- Employee Information:  =
- 
- Available Employees: 1 result(s)
- 
- Show:
- 

In the background, the main application interface is visible, featuring a "Third Party Review" button circled in yellow in the top right corner. Other visible elements include "Save Changes" and "Submit" buttons, a "Rating: Successful" status, and a comment field with a "A comment is required." message.



# Third Party Review: View Appraisal

- You cannot work on the appraisal (only view) while out for review

Write appraisals for your employees ✕

Page 1 of 1 | Displaying 1 - 1 of 1

Employee Name ▲	Task
Haley zzz-halogenEmployee	<span>⏸</span> Sent for Review   <a href="#">View Appraisal</a>

Close





# Third Party Review: Cancel Review

- **Cancel Review** to get the appraisal back if they have not returned it timely

Write appraisals for your employees Help

Haley zzz-halogenEmployee

FY19 Appraisal Process  
By Hal zzz-halogenManager

[Print](#) | [Employee Records](#) | [Appraisals](#)

**Cancel Review**

**Form Navigator**

- Management Performance Appraisal F
- Demographics
- General Instructions
- Rating Scale
- Success Factors
  - Accountability
  - Collaboration
  - Communication
  - Customer Focus
  - Diversity & Inclusion
  - Judgment
  - Time Management
- Fill in the blank (optional)
- Overall Rating
- Supporting Comments
- New Performance Goals (optional)
- Employee Acknowledgment
- Employee Final Comments

**myPerformance**

### Management Performance Appraisal FY19

**Demographics**

Name: Haley zzz-halogenEmployee	Employee ID:
Job Title: Support Analyst	Supervisor: HalManager
Department:	

**General Instructions**

The annual Performance Appraisal is intended to summarize employee performance over the past year and provide an opportunity to plan for the coming year. Use the rating scale definitions below to help accurately document performance. Use the comment box at the end of the appraisal to provide specific examples that support your ratings. An overall comment must be provided.

**Rating Scale**




**Access the Third Party Review Feedback**

---









# Third Party Review: Annotations

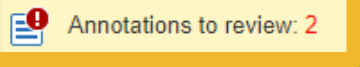
- Once the Third Party Review is back, review **annotations**, and complete the appraisal

Write appraisals for your employees Help 

Haley zzz-halogenEmployee


FY19 Appraisal Process  
By Hal zzz-halogenManager

 Print     Spelling     Check Language     Employee Records     Appraisals     Save Changes     Submit     Third Party Review

**Form Navigator** <  Annotations to review: 2

Management Performance Appraisal Form \*Indicates required field

Demographics  
General Instructions  
Rating Scale  
Success Factors  
Accountability  
Collaboration  
Communication  
Customer Focus  
Diversity & Inclusion  
Judgment  
Time Management  
Fill in the blank (optional)  
Overall Rating

  
**Management Performance Appraisal FY19**

**Demographics**

Name:	<input type="text" value="Haley zzz-halogenEmployee"/>	Employee ID:	<input type="text"/>
Job Title:	<input type="text" value="Support Analyst"/>	Supervisor:	<input type="text" value="HalManager"/>
Department:	<input type="text"/>		



# Third Party Review: Annotations

- Review all annotations to be able to **Submit** for second level approval

The screenshot shows a performance appraisal form with a 'Third Party Review' button in the top right. A modal dialog box is overlaid on the form, displaying the message: 'global.hgncloud.com says You cannot perform this action until you have reviewed all unread annotations.' with an 'OK' button. The form content includes a 'Form Navigator' on the left, a 'Collaboration' section with a bulleted list of responsibilities, and a 'Communication' section with another bulleted list. Rating scales for 'Manager' and 'Self' are visible on the right side of the form.



# Third Party Review: Annotations

- Click on the **annotation icon** to review the annotation

Annotation Details

Section: Success Factors MGMT

Previous Annotations:  
(Most Recent First)

Hanna zzz-halogenVicePres-3/5/19] Third party reviewers can reply to annotations or create new ones.

Hal zzz-halogenManager-3/5/19] Annotations can be used during the editing process to communicate with other evaluators.

New Annotation: |

Entered By:

OK Cancel

Self



# Appraisal: Split Screen

- Click the **Employee Records** icon to see available **Goals, Development Plans, Feedback, and Documents**
- Select the type of record you wish to review
- The menu will display available content for that record
- If there are no past records, the split screen option will not be available

The screenshot displays the 'myPerformance' interface for writing appraisals. At the top, it says 'Write appraisals for your employees' with a 'Help' button. Below this, the employee name 'Haley zzz-halogenEmployee' and the manager 'Hal zzz-halogenManager' are listed. A toolbar contains icons for 'Print', 'Spelling', 'Check Language', 'Employee Records', 'Appraisals', 'Save Changes', 'Submit', and 'Third Party Review'. A 'Form Navigator' on the left lists 'Management Performance Appraisal F', 'Demographics', 'General Instructions', 'Rating Scale', and 'Success Factors'. The 'Employee Records' icon is highlighted with a yellow box, and its dropdown menu is open, showing 'Goals', 'Development Plans', 'Feedback', and 'Documents'. The 'myPerformance' logo and 'Management Performance Appraisal FY19' are centered at the bottom.



# Appraisal: Split Screen

- Similarly, click on the **Appraisals** icon to see **Self-Appraisal, Past Appraisals, and Other Employee's Appraisals**
- Click on one of the options
- The menu will display available content for that record
- If there are no past records, the split screen option will not be available

Write appraisals for your employees Help

Haley zzz-halogenEmployee

FY19 Appraisal Process  
By Hal zzz-halogenManager

Print Spelling Check Language Employee Records Appraisals Save Changes Submit Third Party Review

Form Navigator \*Indicates required

- Management Performance Appraisal F
- Demographics
- General Instructions
- Rating Scale
- Success Factors

Demographics

Self-Appraisal  
Past Appraisals  
Other Employees ▸  
Appraisals  
Past Appraisals

mv Performance  
Management Performance Appraisal FY19



# Appraisal: Rate the Success Factors

- To complete the appraisal, provide a rating for each Success Factor
- A detailed **Rating Scale** is provided on the first page of the appraisal
- The self-appraisal ratings are visible for reference

The screenshot displays a web-based appraisal form. At the top, there are utility icons for Print, Spelling, Check Language, Employee Records, Appraisals, Save Changes, Submit, and Third Party Review. A 'Form Navigator' on the left lists various sections, with 'Success Factors' currently selected. The main content area is titled 'Success Factors' and includes instructions: 'Provide ratings for each Success Factor below. Success Factors are "how" one goes about doing their job. The last competency is an optional, fill in the blank section to be used for an additional competency, performance goal, or key responsibility.'

The first success factor is 'Accountability', defined as 'Owns decisions, outcomes, work products, etc. that are within the scope of one's role.' It includes three bullet points: 'Ensures employees are aware of own responsibilities and those of others, while integrating all responsibilities to accomplish goals and objectives', 'Measures and tracks performance of individual and/or team(s) against goals and objectives, ensuring each employee contributes to overall outcomes', and 'Conducts status updates with employees to manage work, including changes, delays and/or risks; ensures realistic and achievable results; coaches individuals on how to manage expectations'.

To the right of the text is a rating scale table with two columns: 'Manager' and 'Self'. The scale options are: Outstanding, Exceeds Expectations, Successful, Improvement Expected, and Unacceptable. The 'Exceeds Expectations' option is selected for the Manager rating.

Manager	Self
<input type="radio"/> Outstanding	<input type="radio"/>
<input checked="" type="radio"/> Exceeds Expectations	<input type="radio"/>
<input type="radio"/> Successful	<input checked="" type="radio"/>
<input type="radio"/> Improvement Expected	<input type="radio"/>
<input type="radio"/> Unacceptable	<input type="radio"/>





# Appraisal: Fill-in-the-blank

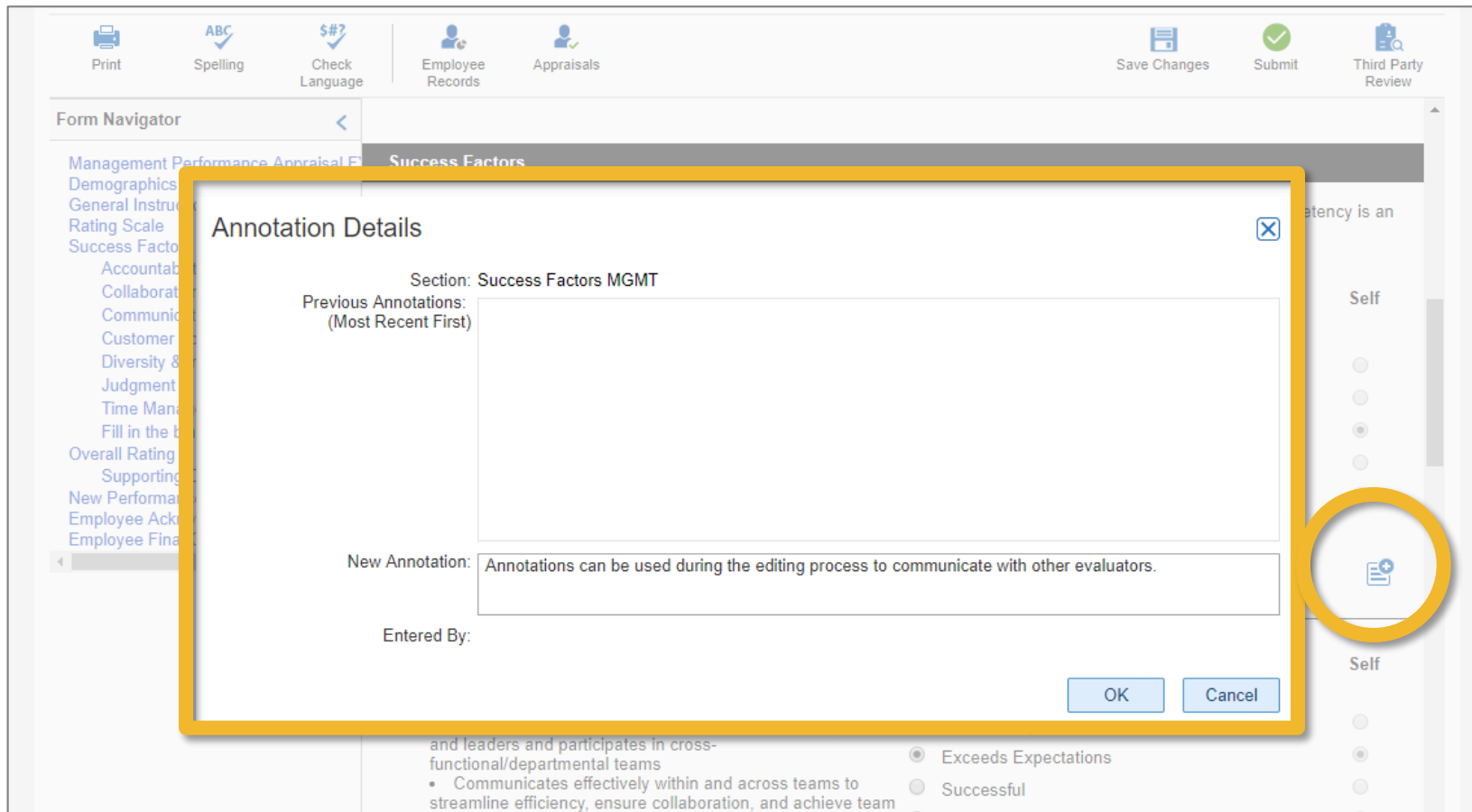
- The last rated component of the form is the optional fill in the blank section
- Evaluators can use even if employee did not use it on the self-appraisal
- If the employee entered something and should not have, evaluators can choose **Not Applicable**

The screenshot displays a web-based appraisal form interface. At the top, there are navigation icons for Print, Spelling, Check Language, Employee Records, Appraisals, Save Changes, Submit, and Third Party Review. On the left, a 'Form Navigator' lists various appraisal components, with 'Fill in the blank (optional)' highlighted. The main content area shows a large text input field for the 'Fill in the blank (optional)' section. To the right of this field are two columns of radio buttons for rating: 'Manager' and 'Self'. The 'Manager' column includes options: Outstanding, Exceeds Expectations, Successful, Improvement Expected, Unacceptable, and Not Applicable. The 'Self' column has six radio buttons. A yellow box highlights the 'Fill in the blank (optional)' section, and a yellow arrow points to the 'Not Applicable' radio button under the 'Manager' column.



# Appraisal: Annotations

- **Annotations** are available for each Success Factor
- They can be used to communicate with other evaluators




The screenshot displays a software interface for managing appraisals. At the top, there are navigation icons for Print, Spelling, Check Language, Employee Records, Appraisals, Save Changes, Submit, and Third Party Review. A 'Form Navigator' on the left lists various sections, with 'Success Factors' currently selected. The main content area shows 'Annotation Details' for the 'Success Factors MGMT' section. It includes a text area for 'Previous Annotations (Most Recent First)', a text input field for 'New Annotation' containing the text 'Annotations can be used during the editing process to communicate with other evaluators.', and a label for 'Entered By:'. At the bottom right of the dialog, there are 'OK' and 'Cancel' buttons. A yellow circle highlights a plus icon in the bottom right corner of the dialog box, indicating the option to add a new annotation.



# Appraisal: Annotations

- The **annotation icon** changes to indicate that there are annotations to view

Accountability	Manager	Self
Owns decisions, outcomes, work products, etc. that are within the scope of one's role.	<ul style="list-style-type: none"><li><input type="radio"/> Outstanding</li><li><input checked="" type="radio"/> Exceeds Expectations</li><li><input type="radio"/> Successful</li><li><input type="radio"/> Improvement Expected</li><li><input type="radio"/> Unacceptable</li></ul>	<ul style="list-style-type: none"><li><input type="radio"/></li><li><input type="radio"/></li><li><input checked="" type="radio"/></li><li><input type="radio"/></li><li><input type="radio"/></li></ul>
<ul style="list-style-type: none"><li>• Ensures employees are aware of own responsibilities and those of others, while integrating all responsibilities to accomplish goals and objectives</li><li>• Measures and tracks performance of individual and/or team(s) against goals and objectives, ensuring each employee contributes to overall outcomes</li><li>• Conducts status updates with employees to manage work, including changes, delays and/or risks; ensures realistic and achievable results; coaches individuals on how to manage expectations</li></ul>		









# Appraisal: Goals (optional)

- If you desire, add a New Performance Goal for the employee
- You can add multiple goals clicking on **Add New Goal**

### New Performance Goals (optional)

Establish new Performance Goals in the boxes below by providing a title, description, and weight for each goal. To add more than one goal, click on the Add Goal link. Note that once the process is complete, goals entered in this section on the manager version of the form will populate in the employee's My Performance tab in the Goals sub-tab.

	Weight
 Goal <input type="text"/>	<input type="text"/> %
<input type="text"/>	
Start: <input type="text"/> 	Due: <input type="text"/> 



# Tip: Setting SMART Goals

- SMART goals answer the question: “What needs to be done, When, Why, and to What Standard?”

## **S**pecific

- Emphasize action/ results
- Use specific action verbs

## **M**easurable

- Objective, measurable goals can be tracked
- Helps you know when goal is complete

## **A**ttainable

- Consider resources available
- Helps you prioritize

## **R**elevant

- Meaningful to you and the University
- Consistent with department goals

## **T**ime-bound

- Includes start and end points
- Timelines need to be measurable



# Appraisal: Supporting Comment

- One overall comment is required
- Use this opportunity to provide justification for your ratings using detailed examples

The screenshot shows a web-based performance appraisal form. At the top, there are navigation icons for Print, Spelling, Check Language, Employee Records, Appraisals, Save Changes, Submit (circled in yellow), and Third Party Review. Below this is a 'Form Navigator' sidebar with a list of sections: Management Performance Appraisal Form, Demographics, General Instructions, Rating Scale, Success Factors (Accountability, Collaboration, Communication, Customer Focus, Diversity & Inclusion, Judgment, Time Management, Fill in the blank (optional)), Overall Rating, Supporting Comments, New Performance Goals (optional), Employee Acknowledgment, and Employee Final Comments. The main content area is titled 'Overall Rating' and shows 'Rating: Successful'. Below this is the 'Supporting Comments' section, which is highlighted with a yellow border. It contains the following text: 'Supporting Comments' followed by 'Use this comment box to provide specific examples that support your Success Factor ratings. A comment is required.' Below this is a grey box with the text 'Self: Use the comment box at the end of the appraisal to provide specific examples that support your ratings. An overall comment must be provided.' and a white box with the text '\* Comments: Use the comment box at the end of the appraisal to provide specific examples that support your ratings. An overall comment must be provided.' There is a large empty text area for entering comments. At the bottom right of the form, there are icons for Spelling and a plus sign.



# Appraisal: Save Changes or Submit

- You may click **Save Changes** at any point if you would like to exit the appraisal and come back to it later
- Click **Submit** when finished
- Spelling and language check are automatic when submitted

Print Spelling Check Language Employee Records Appraisals Save Changes Submit Third Party Review

Form Navigator < \*Indicates required field

Management Performance Appraisal FY19  
Demographics  
General Instructions  
Rating Scale  
Success Factors  
Accountability  
Collaboration  
Communication  
Customer Focus  
Diversity & Inclusion  
Judgment  
Time Management  
Fill in the blank (optional)  
Overall Rating  
Supporting Comments  
New Performance Goals (optional)  
Employee Acknowledgment

**myPerformance**  
Management Performance Appraisal FY19

**Demographics**

Name: Haley zzz-halogenEmployee Employee ID:

Job Title: Support Analyst Supervisor: HalManager

Department:


**General Instructions**

The annual Performance Appraisal is intended to summarize employee performance over the past year and provide an opportunity to plan for the coming year. Use the rating scale definitions below to help accurately document performance. Use the comment box at the end of the appraisal to provide specific examples that support your ratings. An overall comment must be provided.



# Appraisal: Submitted

- After submitted, the appraisal can still be accessed but not edited
- Should you need to make a revision contact the HR Service Center:
  - (573) 882-2146 or [myPerformance@umsystem.edu](mailto:myPerformance@umsystem.edu)



The screenshot displays the 'myPerformance' web interface for a 'Management Performance Appraisal FY19'. The top navigation bar includes 'Print', 'Employee Records', and 'Appraisals' (highlighted with a yellow box and a green checkmark labeled 'Completed'). The left sidebar, titled 'Form Navigator', lists various sections: Management Performance Appraisal F, Demographics, General Instructions, Rating Scale, Success Factors (Accountability, Collaboration, Communication, Customer Focus, Diversity & Inclusion, Judgment, Time Management, Fill in the blank (optional)), Overall Rating, Supporting Comments, New Performance Goals (optional), Employee Acknowledgment, and Employee Final Comments. The main content area shows the 'Demographics' section with the following information: Name: Haley zzz-halogenEmployee, Employee ID: [blank], Job Title: Support Analyst, Supervisor: HalManager, and Department: [blank]. Below this is the 'General Instructions' section, which states: 'The annual Performance Appraisal is intended to summarize employee performance over the past year and provide an opportunity to plan for the coming year. Use the rating scale definitions below to help accurately document performance. Use the comment box at the end of the appraisal to provide specific examples that support your ratings. An overall comment must be provided.' The 'Rating Scale' section is partially visible, starting with 'Outstanding' and its definition: 'Is a role model in the job. Exhibits mastery in all facets of the job. Puts the customer at the center of every activity. Steps outside of existing'.





# **Second Level Approval (and Calibration)**

---

# **Meet and Discuss**

---

# Access: Your Tasks

- If desired, the employee can be sent a PDF of the appraisal prior to your one-on-one

The screenshot displays the 'myPerformance' web application interface. At the top left, there is a navigation menu with a home icon and the 'myPerformance' logo. Below the navigation, the main content area is titled 'Tasks (2) | All Tasks | ⚙️'. Two task cards are visible: one for '6/30/19' with the text 'Meet and discuss appraisal with employees (1 To-Do)' and 'FY19 Appraisal Process', and another for '7/15/19' with the text 'Sign-off appraisals for employees' and 'FY19 Appraisal Process'. The first task card is highlighted with a yellow border. Below the tasks, there is a 'Shortcuts' section with a 'View Reports' button. A tooltip is displayed over the 'View Reports' button, containing the text: 'Meet with your employees to discuss the appraisal, and then submit the appraisal to send it to the employees for sign off. If you choose, you can create a PDF of the appraisal so they can review it before your discussion.' At the bottom right, there are links for 'Finance Webpage' and 'UMKC myPerformance Webpage'.



# Discussion: Review

- Review and comment – check edits and annotations the second level might have made, revise if needed

Meet and discuss appraisal with employees ✕

Page 1 of 1 | Displaying 1 - 1 of 1

Employee Name ▲	Task
Haley zzz-halogenEmployee	<input checked="" type="radio"/> Review & Comment

Close



# Discussion: Options

- **Print** to PDF (to provide to employee prior to conversation)
- **Save Changes** if you make revisions
- **Submit** to send to the employee for sign-off and comment

The screenshot displays a web-based form for a Management Performance Appraisal. At the top, there are several utility buttons: 'Print' (highlighted with a yellow box), 'Spelling' (ABC icon), 'Check Language' (\$#? icon), 'Employee Records' (person icon), and 'Appraisals' (person with checkmark icon). On the right side, there are 'Save Changes' (floppy disk icon, highlighted with a yellow box) and 'Submit' (checkmark icon, highlighted with a yellow box) buttons.

The main content area is titled 'Form Navigator' and includes a list of sections on the left: Management Performance Appraisal F, Demographics, General Instructions, Rating Scale, Success Factors, Accountability, Collaboration, Communication, Customer Focus, Diversity & Inclusion, Judgment, Time Management, and Fill in the blank (optional). The 'Success Factors' section is currently active and highlighted in black. It contains the following text: 'Provide ratings for each Success Factor below. Success Factors are "how" one goes about doing their job. The last competency is an optional, fill in the blank section to be used for an additional competency, performance goal, or key responsibility.'

Below this text is the 'Accountability' section, which includes the description: 'Owns decisions, outcomes, work products, etc. that are within the scope of one's role.' and a bullet point: 'Ensures employees are aware of own responsibilities and those of others, while integrating all responsibilities to accomplish goals and objectives'. To the right of this text are two columns of rating options: 'Manager' and 'Self'. Under 'Manager', there are two radio buttons: 'Outstanding' (unselected) and 'Exceeds Expectations' (selected). Under 'Self', there are two radio buttons, both of which are unselected.



# Tip: Preparing for the Conversation

- Schedule the meeting in a quiet, private location where interruptions will not occur
- Provide a copy of the appraisal to the employee ahead of time if you choose
- Avoid rescheduling or pushing back the meeting
- Be prepared to discuss goals and development plans, especially if expectations are not met on one or more factors



# Tip: Conducting the Conversation

- Give objective and specific examples
- Encourage discussion
- Actively listen
- Be open to what the employee has to say
- Create a positive, forward-looking environment
- Build on the employee's strengths
- Keep the meeting on track



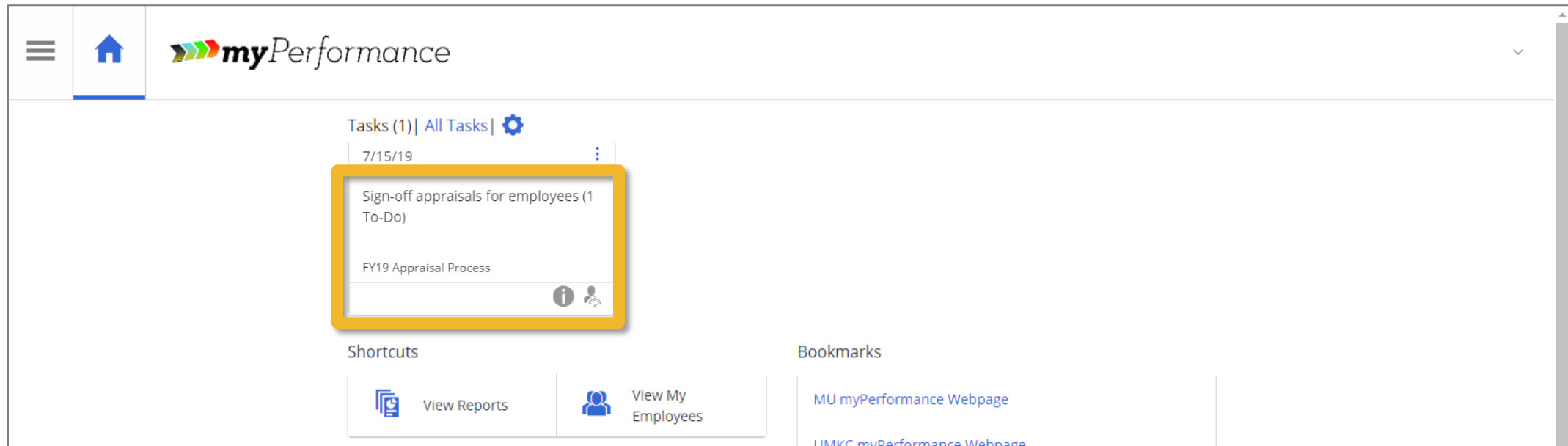
# **Employee Sign-Off and Comments Evaluator Finalizes**

---



# Access: Your Tasks

- You **Submit** the appraisal to the employee, they will add final comments (optional) and sign-off the appraisal
- Once that is done, you will have a pending task



The screenshot displays the 'myPerformance' web application interface. At the top, there is a navigation bar with a home icon and the 'myPerformance' logo. Below the navigation bar, the main content area shows a 'Tasks (1) | All Tasks |' header with a gear icon. A task card is highlighted with a yellow border, containing the text '7/15/19', 'Sign-off appraisals for employees (1 To-Do)', and 'FY19 Appraisal Process'. Below the task card, there are sections for 'Shortcuts' and 'Bookmarks'. The 'Shortcuts' section includes 'View Reports' and 'View My Employees'. The 'Bookmarks' section includes 'MU myPerformance Webpage' and 'UMKC myPerformance Webpage'.



# Finalize: View Appraisal

- Click on **View appraisal** to see final comments from employee

Sign-off appraisals for employees ✕

Page 1 of 1 | Displaying 1 - 1 of 1

Employee Name ▲	Task
Haley zzz-halogenEmployee	<input type="radio"/> Sign Off   <a href="#">View Appraisal</a>

Close



# Finalize: Review Comments and Sign-Off

- Review **Employee Final Comments**, and **Sign Off**

Save | Print | Employee Records | Appraisals | **Sign Off**

**Self:** Use the comment box at the end of the appraisal to provide specific examples that support your ratings. An overall comment must be provided.  
**Comments:** Use the comment box at the end of the appraisal to provide specific examples that support your ratings. An overall comment must be provided.  
Second level approvers can directly edit comments.

**New Performance Goals (optional)**

Establish new Performance Goals in the boxes below by providing a title, description, and weight for each goal. To add more than one goal, click on the Add Goal link. Note that once the process is complete, goals entered in this section on the manager version of the form will populate in the employee's My Performance tab in the Goals sub-tab.

	Weight
Self:	

Start:                      Due:

**Employee Acknowledgment**

I have discussed my performance appraisal with my supervisor. My signature does not necessarily indicate agreement with the appraisal, but

**Employee Final Comments**

Add additional comments if desired.

Employee:	Haley zzz-halogenEmployee H.z. (electronic signature for the evaluation of Haley zzz-halogenEmployee)
Date (M/d/yy):	3/5/19 12:58 PM EST



# **Using myPerformance Year Round**

---

# Tip: Ongoing Feedback

- Performance appraisals should never be a surprise
- Employees need **timely** and regular feedback
  - Acknowledging positive behavior increases its frequency
  - Not addressing concerns reinforces the negative behaviors
- While feedback should always be done in person, myPerformance provides many optional features for evaluators and employees to track feedback throughout the year
- Using myPerformance year round will make writing appraisals much easier for both the employee and evaluator



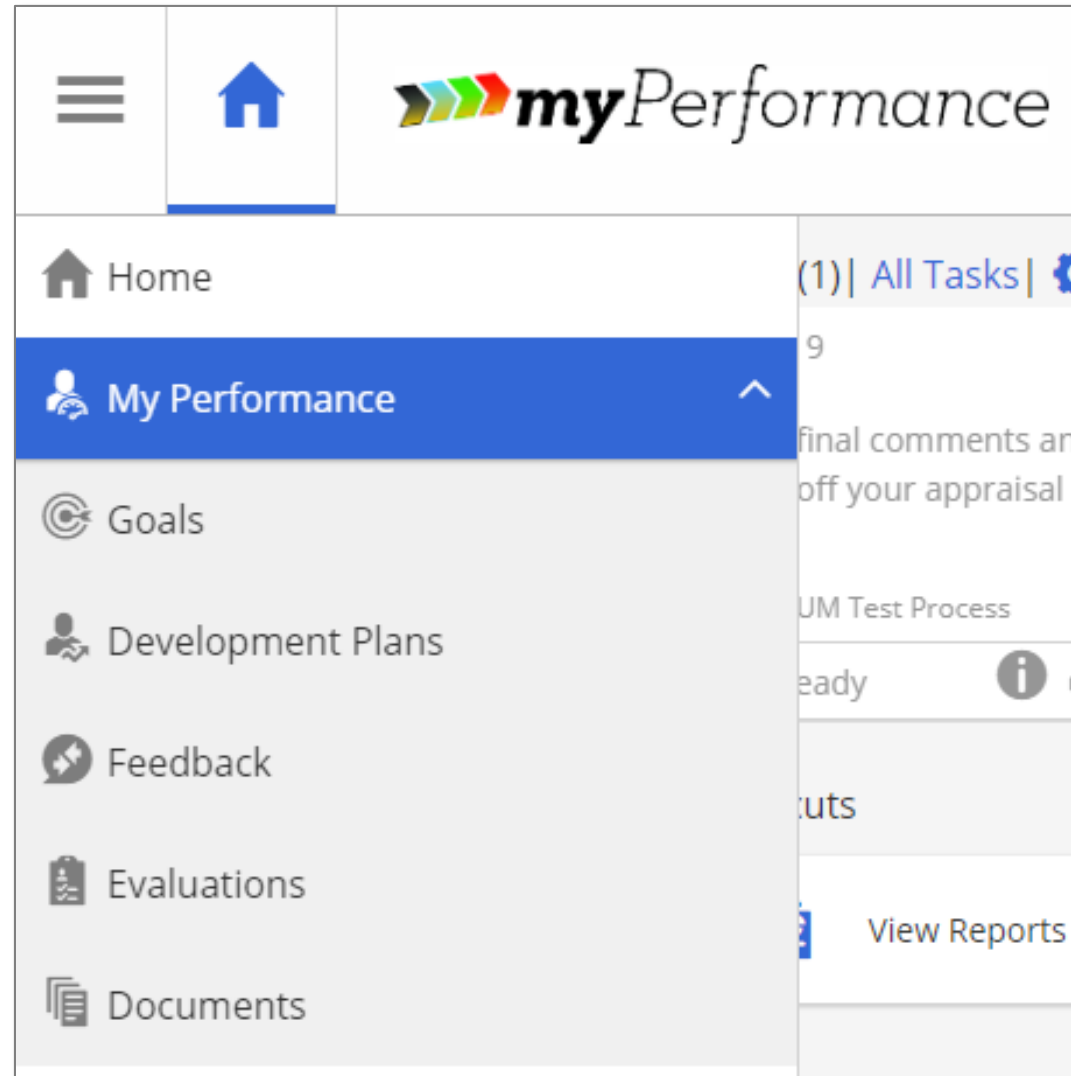
# Tip: Follow-Up Throughout the Year

- Remember that annual reviews are only a small part of the performance management process
- Day to day conversations are most important
- Address positive and negative behavior as it occurs
- Create goals and development plans with scheduled check-in dates; Use Outlook
- Encourage professional growth opportunities
- Create a record of notable events



# Access: Using myPerformance Year Round

- Employees and evaluators can add new, and access past, performance related information throughout the year:
  - Feedback
  - Goals
  - Evaluations
  - Development Plans
  - Documents



# Questions?

University of Missouri System  
COLUMBIA | KANSAS CITY | ROLLA | ST. LOUIS