

# Second Level Approver Guide

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University of Missouri System

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# Second Level Approver Expectations

- Work with your direct reports in order to reach similar definitions of the rating scale
- This is important as it increases fairness and consistency to the process
- If you have multiple evaluators in your reporting line, consider using the reporting directions that follow to analyze rating consistency at a high level prior to beginning your review



# 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.

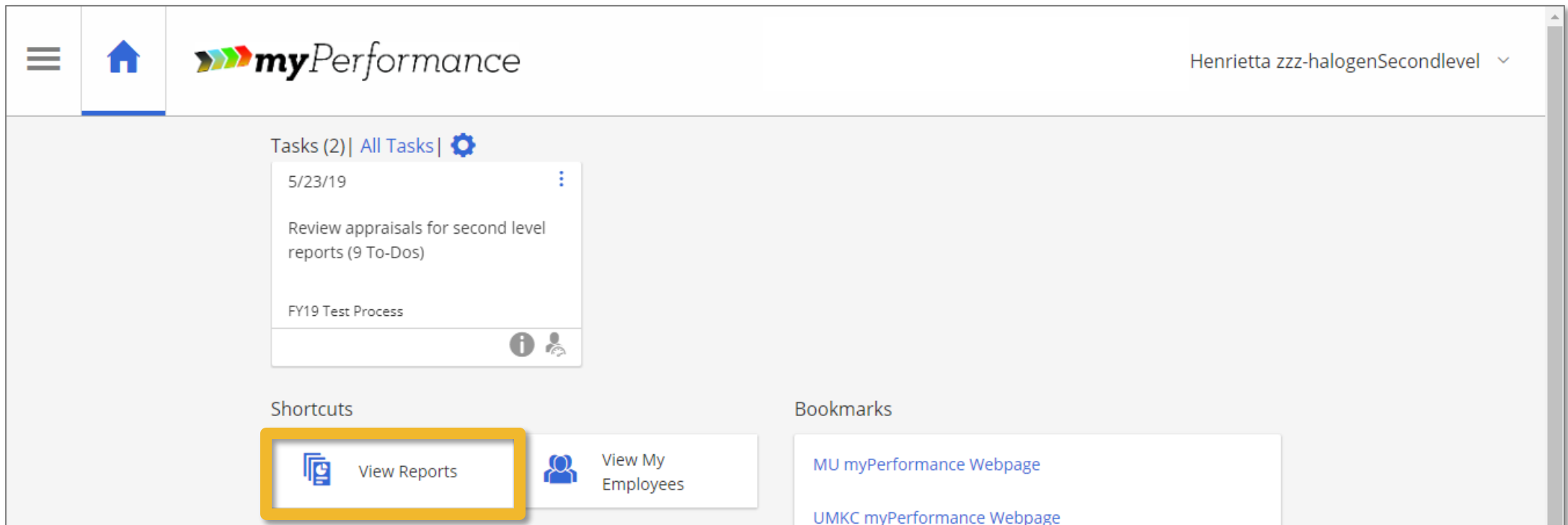


# Reporting Capability

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# Reporting: Generate a Score Report

- On the home page you can find the Shortcut **View Reports**

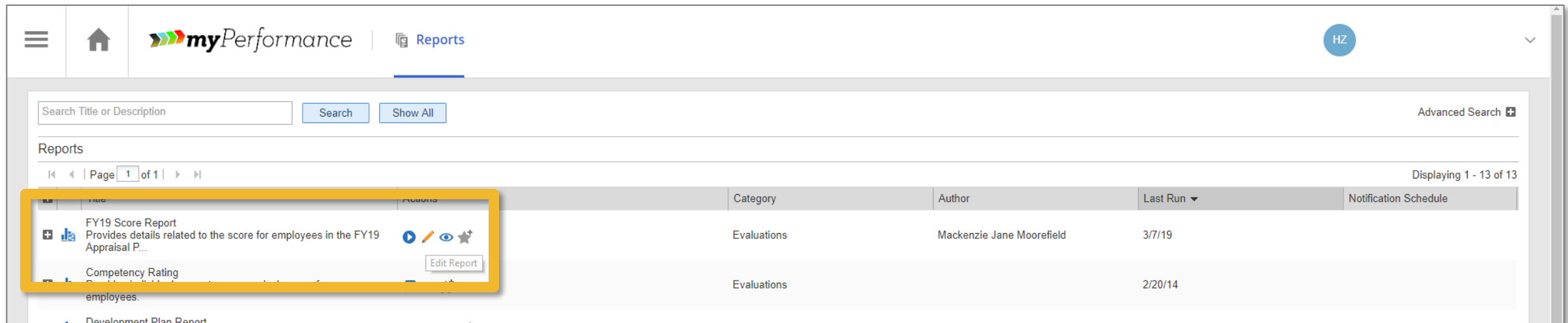


The screenshot displays the myPerformance application interface. At the top left, there is a navigation menu with a home icon. The logo 'myPerformance' is centered at the top. On the top right, the user name 'Henrietta zzz-halogenSecondlevel' is shown with a dropdown arrow. Below the header, there is a 'Tasks (2) | All Tasks | [gear icon]' section. A task card is visible with the date '5/23/19', the text 'Review appraisals for second level reports (9 To-Dos)', and 'FY19 Test Process'. Below the tasks, there are two sections: 'Shortcuts' and 'Bookmarks'. In the 'Shortcuts' section, the 'View Reports' button is highlighted with a yellow border. Other shortcuts include 'View My Employees'. The 'Bookmarks' section contains links for 'MU myPerformance Webpage' and 'UMKC myPerformance Webpage'.



# Reporting: Generate a Score Report

- Click the **pencil icon** next to the **FY19 Score Report**



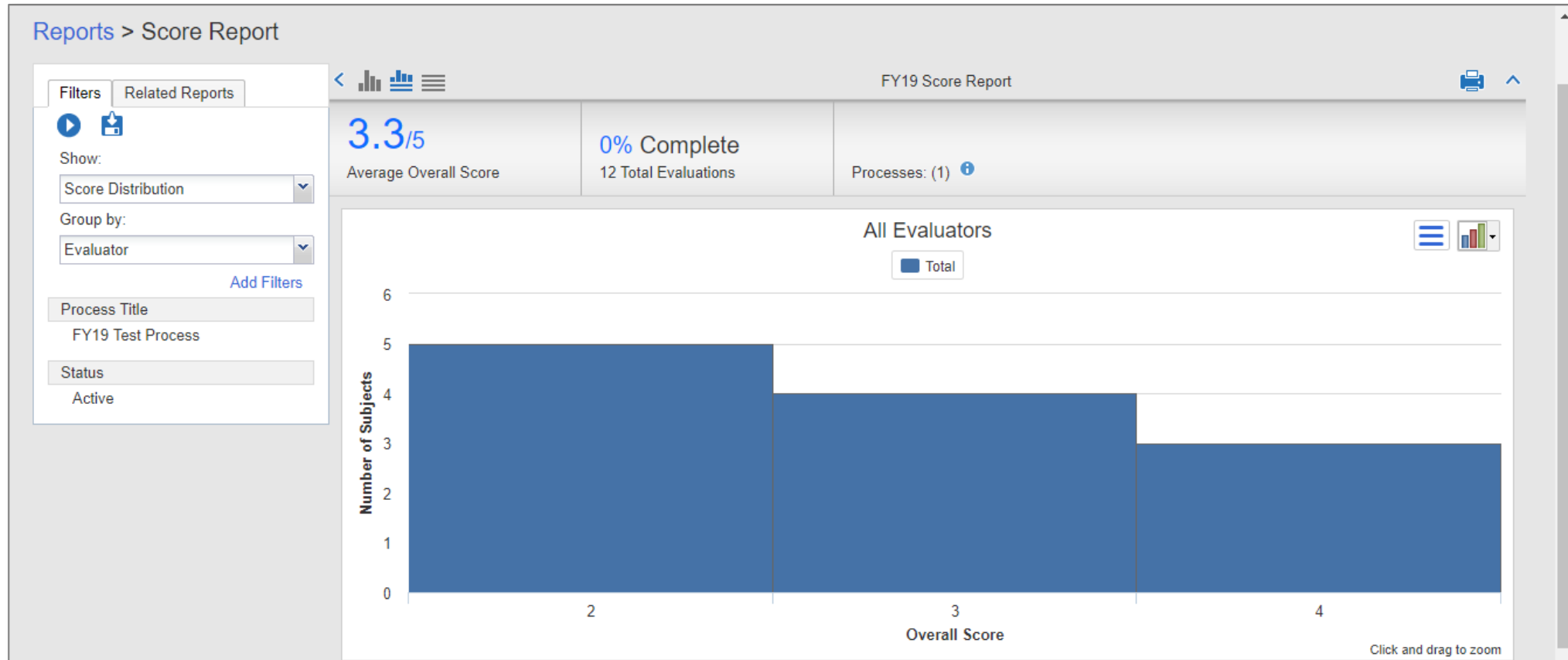
The screenshot displays the 'myPerformance' web application interface. At the top, there is a navigation bar with a home icon, the 'myPerformance' logo, and a 'Reports' tab. Below the navigation bar is a search section with a text input field labeled 'Search Title or Description', 'Search' and 'Show All' buttons, and an 'Advanced Search' link. The main content area is titled 'Reports' and shows a table of report entries. The first entry, 'FY19 Score Report', is highlighted with a yellow box. This entry includes a pencil icon for editing, a play icon, an eye icon, and a star icon. The table columns are 'Category', 'Author', 'Last Run', and 'Notification Schedule'. The 'FY19 Score Report' row shows 'Evaluations' as the category, 'Mackenzie Jane Moorefield' as the author, and '3/7/19' as the last run date. Below it, another row for 'Competency Rating' shows 'Evaluations' as the category and '2/20/14' as the last run date. The page footer indicates 'Page 1 of 1' and 'Displaying 1 - 13 of 13'.

| Category    | Author                    | Last Run | Notification Schedule |
|-------------|---------------------------|----------|-----------------------|
| Evaluations | Mackenzie Jane Moorefield | 3/7/19   |                       |
| Evaluations |                           | 2/20/14  |                       |



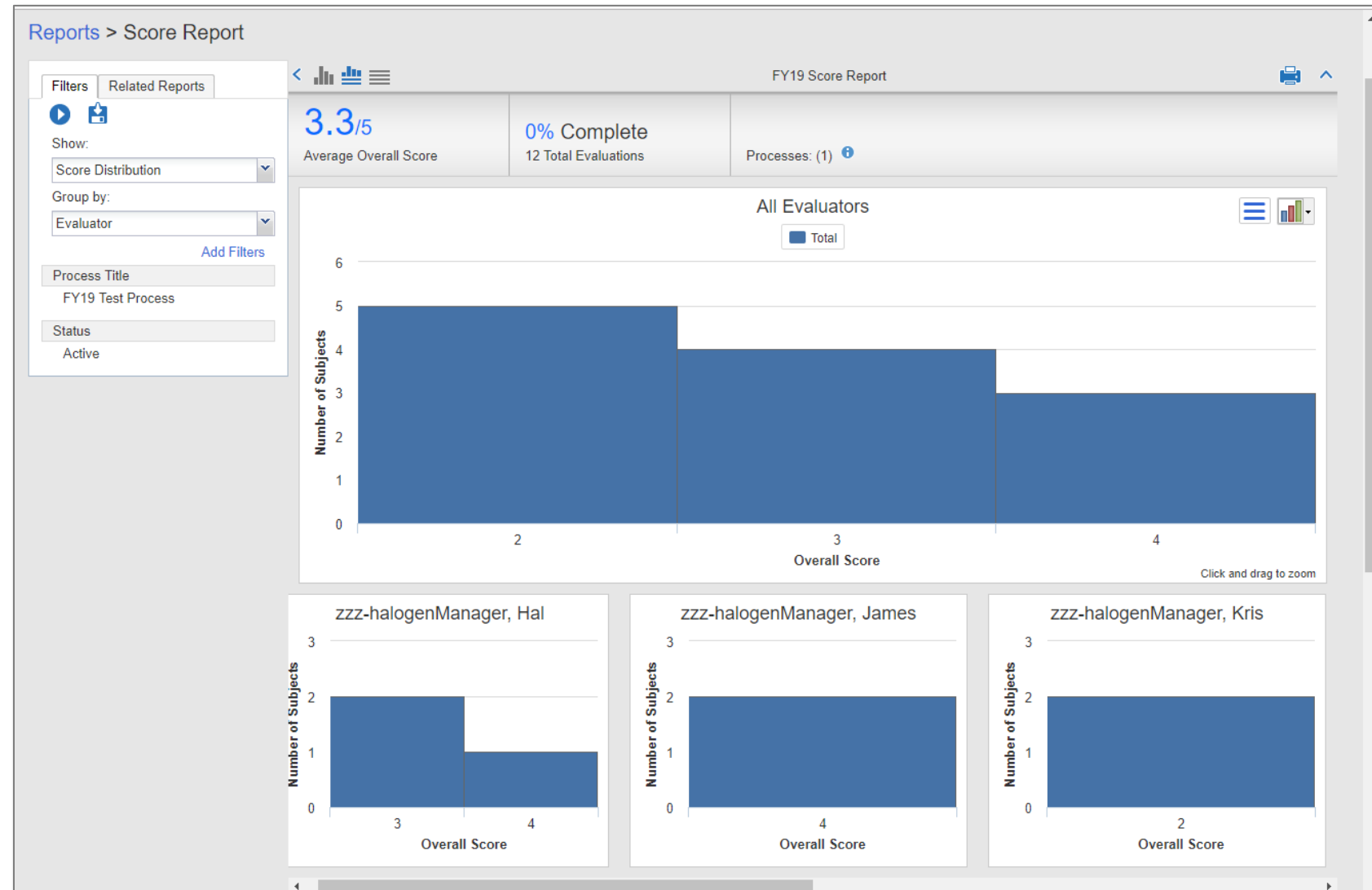
# Reporting: Generate a Score Report

- Select the dropdown menu under **Group by** and choose **Evaluator**
- Click the **blue play button icon** to run the report



# Reporting: Analyzing a Score Report

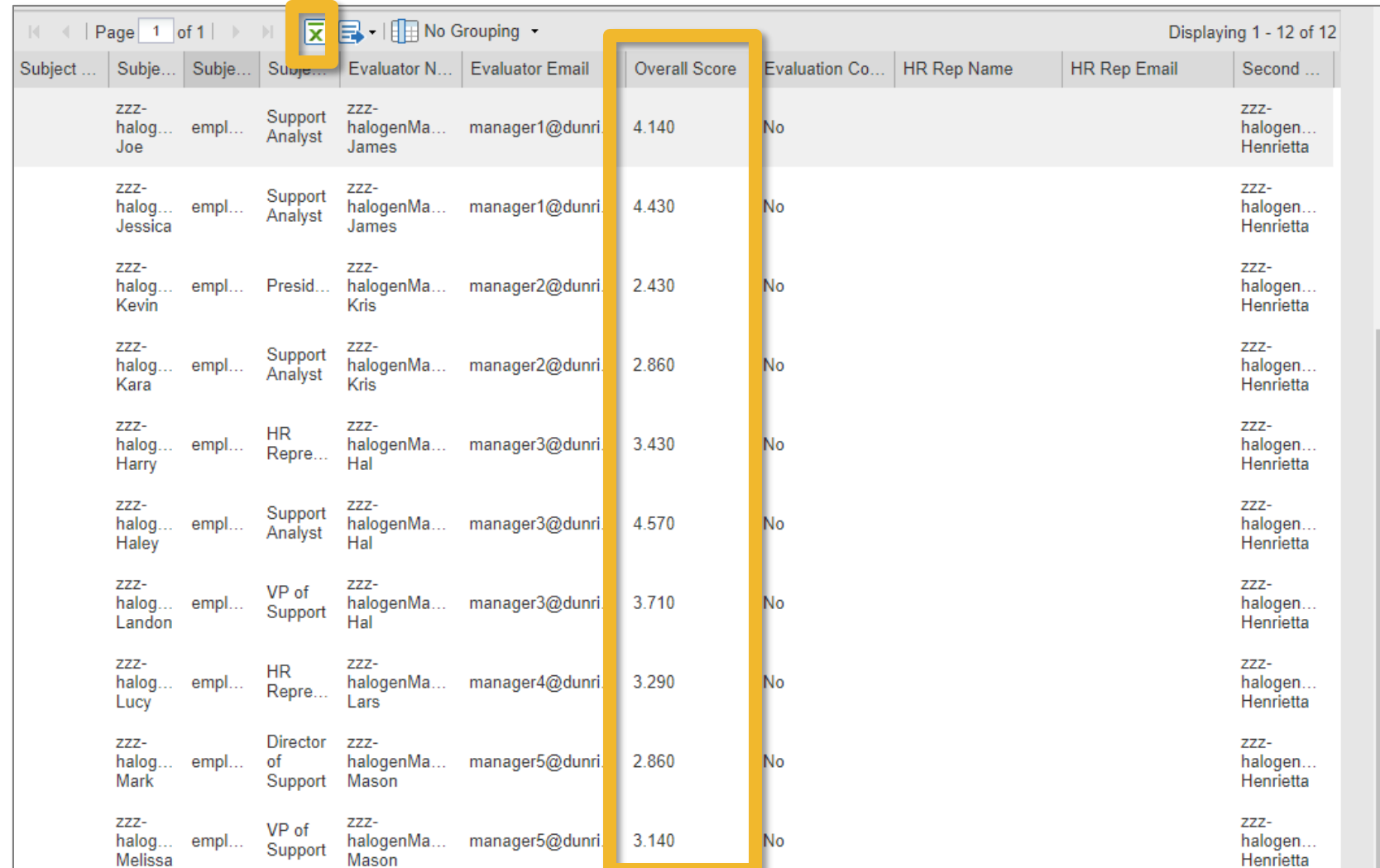
- Observe the score distribution of your entire evaluator group
- Drill down to detail by evaluator





# Reporting: Analyzing a Score Report

- You can also view scores for each employee
- Click on the column headers to reorder (e.g., alphabetical, by score, etc.)
- This information can also be exported to Excel



The screenshot shows a web-based score report interface. At the top, there is a navigation bar with 'Page 1 of 1', an Excel export icon, and 'No Grouping'. The table has columns for Subject, Evaluator Name, Evaluator Email, Overall Score, Evaluation Co..., HR Rep Name, HR Rep Email, and Second ... The 'Overall Score' column is highlighted with a yellow box. The data rows are as follows:

| Subject ...  | Subje... | Subje...            | Subje...         | Evaluator N... | Evaluator Email | Overall Score | Evaluation Co... | HR Rep Name | HR Rep Email | Second ... |
|--------------|----------|---------------------|------------------|----------------|-----------------|---------------|------------------|-------------|--------------|------------|
| zzz-halog... | empl...  | Support Analyst     | zzz-halogenMa... | manager1@dunri | 4.140           | No            | zzz-halogen...   | Henrietta   |              |            |
| zzz-halog... | empl...  | Support Analyst     | zzz-halogenMa... | manager1@dunri | 4.430           | No            | zzz-halogen...   | Henrietta   |              |            |
| zzz-halog... | empl...  | Presid...           | zzz-halogenMa... | manager2@dunri | 2.430           | No            | zzz-halogen...   | Henrietta   |              |            |
| zzz-halog... | empl...  | Support Analyst     | zzz-halogenMa... | manager2@dunri | 2.860           | No            | zzz-halogen...   | Henrietta   |              |            |
| zzz-halog... | empl...  | HR Repre...         | zzz-halogenMa... | manager3@dunri | 3.430           | No            | zzz-halogen...   | Henrietta   |              |            |
| zzz-halog... | empl...  | Support Analyst     | zzz-halogenMa... | manager3@dunri | 4.570           | No            | zzz-halogen...   | Henrietta   |              |            |
| zzz-halog... | empl...  | VP of Support       | zzz-halogenMa... | manager3@dunri | 3.710           | No            | zzz-halogen...   | Henrietta   |              |            |
| zzz-halog... | empl...  | HR Repre...         | zzz-halogenMa... | manager4@dunri | 3.290           | No            | zzz-halogen...   | Henrietta   |              |            |
| zzz-halog... | empl...  | Director of Support | zzz-halogenMa... | manager5@dunri | 2.860           | No            | zzz-halogen...   | Henrietta   |              |            |
| zzz-halog... | empl...  | VP of Support       | zzz-halogenMa... | manager5@dunri | 3.140           | No            | zzz-halogen...   | Henrietta   |              |            |



# Analyzing a Score Report

- As you review the report consider the following questions:

What does the overall distribution look like? Does that distribution corroborate the results your unit accomplished in the past year?

What do the score distributions by each manager look like? Does it appear that one manager is a more difficult or lenient rater than other managers?

Look at the employees that have similar scores. When considering the results those employees accomplished, does that grouping make sense?

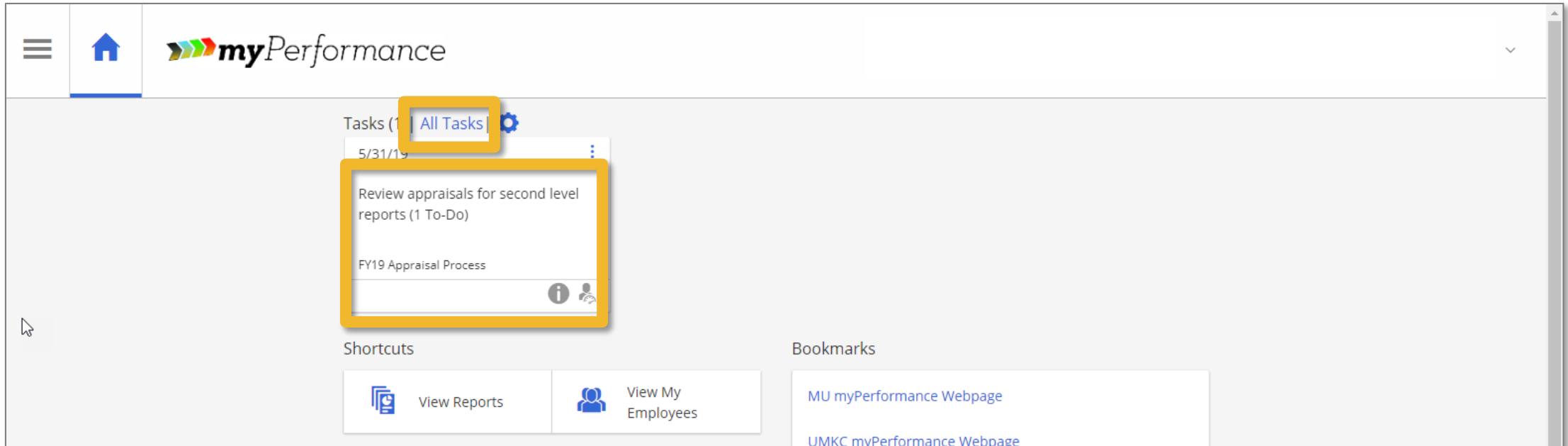


# **Completing Your Review and Approval**

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# Access: Your Tasks

- From the home screen, click on the pending task **Review appraisals for second level reports** or click on **All Tasks**



The screenshot displays the myPerformance home screen. At the top left, there is a home icon and the myPerformance logo. Below the logo, a task card is highlighted with a yellow border. The task card is titled 'Tasks (1)' and 'All Tasks' with a gear icon. It shows a due date of '5/31/19' and a list of tasks: 'Review appraisals for second level reports (1 To-Do)' and 'FY19 Appraisal Process'. Below the task card, there are two sections: 'Shortcuts' and 'Bookmarks'. The 'Shortcuts' section contains two buttons: 'View Reports' and 'View My Employees'. The 'Bookmarks' section contains two links: 'MU myPerformance Webpage' and 'UMKC myPerformance Webpage'.



# Access: The Appraisal

- Locate the employee and select **Review & Approve** next to their name

Review appraisals for second level reports ✕

Page 1 of 1 | Displaying 1 - 9 of 9

| Employee Name ▲             | Task                                   |
|-----------------------------|--|
| Haley zzz-halogenEmployee   | <input type="radio"/> Review & Approve |
| Harry zzz-halogenEmployee   | <input type="radio"/> Review & Approve |
| Jessica zzz-halogenEmployee | <input type="radio"/> Review & Approve |
| Landon zzz-halogenEmployee  | <input type="radio"/> Review & Approve |
| Lucy zzz-halogenEmployee    | <input type="radio"/> Review & Approve |
| Mark zzz-halogenEmployee    | <input type="radio"/> Review & Approve |
| Melissa zzz-halogenEmployee | <input type="radio"/> Review & Approve |

Close



# Review: 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 **Return to Author**

Print Spelling Check Language Employee Records Appraisals Save Changes Return to Author Approve

Indicates required field

## myPerformance

### Management 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

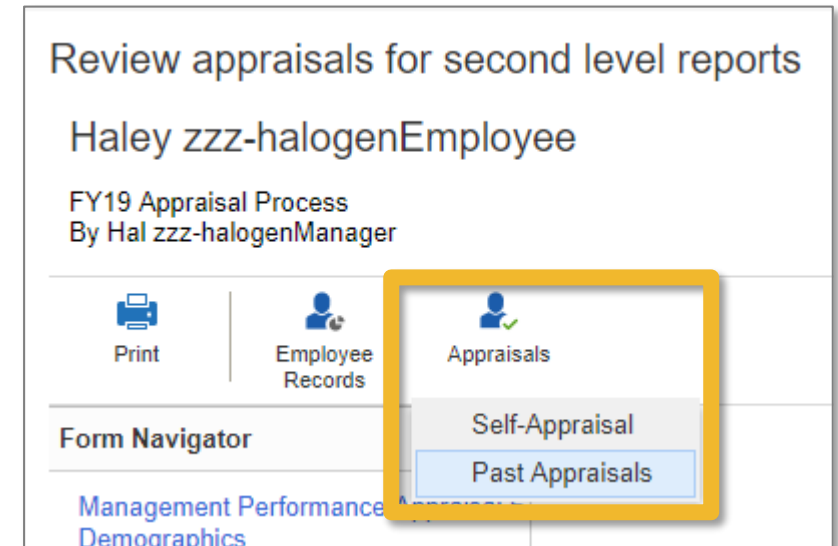
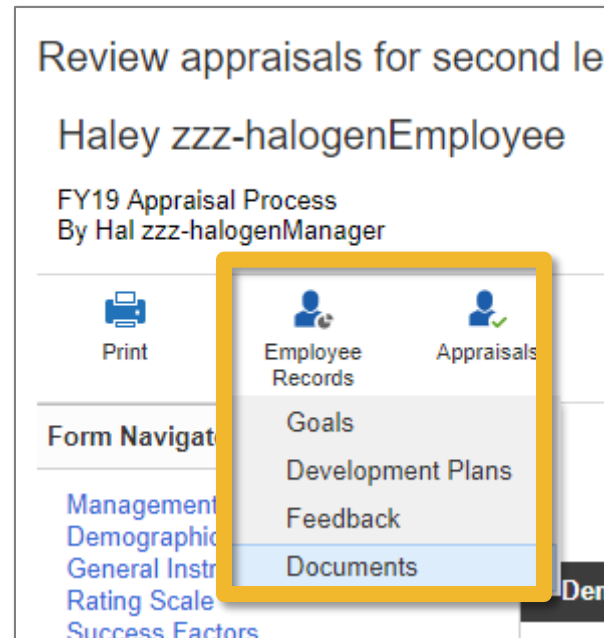
#### Form Navigator

- 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



# Review: Split Screen

- Click the **Employee Records** icon to see available **Goals**, **Development Plans**, **Feedback**, and **Documents**
- Click the **Employee Records** icon to see 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



# Review: Edit Ratings

- The you can also directly edit the ratings

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, Return to Author, and Approve. A 'Form Navigator' sidebar on the left lists various 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), and Employee Acknowledgment. The main content area is titled 'Communication' and includes a description: 'Provides information clearly and accurately in various settings, ensuring understanding and participation.' Below this are two columns of radio button options for 'Manager' and 'Self'. The 'Manager' column has five options: Outstanding, Exceeds Expectations (selected), Successful, Improvement Expected, and Unacceptable. The 'Self' column has five unselected options. A yellow box highlights the 'Manager' column, and a yellow arrow points from this box to a larger, more detailed view of the same section below.

This is a detailed view of the 'Communication' section from the performance appraisal form. It shows the same description: 'Provides information clearly and accurately in various settings, ensuring understanding and participation.' The 'Manager' column has five radio button options: Outstanding, Exceeds Expectations, Successful (selected), Improvement Expected, and Unacceptable. The 'Self' column has five unselected options. A yellow box highlights the 'Manager' column, and a yellow arrow points from this box to a larger, more detailed view of the same section below.





# Review: Annotations


- Review and add a comment to an existing annotations, create a new annotation

**Communication**

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

- Determines and delivers the appropriate messages effectively to any level ensuring clarity and understanding
- Understands various audiences and their nuances, adjusting style and content to appeal to their needs; coaches others on how to adjust tone and style when communicating
- Listens actively to determine unstated needs and concerns, verify messages, and clarify expectations; coaches and offers constructive feedback when appropriate

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



Section: Success Factors MGMT

Previous Annotations: (Most Recent First) feedback. Hanna zzz-halogenVicePres-3/5/19] Add new annotations to provide

New Annotation:

Entered By:



# Review: Edit Comments

- You can also edit or add to the overall comments at the end of the appraisal
- Consider writing your own personal note to the employee

The screenshot displays a web-based performance appraisal form. At the top, there are utility icons for Print, Spelling (ABC), Check Language (\$#?), Employee Records, Appraisals, Save Changes, Return to Author, and Approve. A 'Form Navigator' on the left lists various sections, with 'Overall Rating' and 'Supporting Comments' highlighted. The 'Overall Rating' section shows a 'Rating: Successful'. The 'Supporting Comments' section includes instructions for providing specific examples and a text area for comments. A yellow box highlights the 'Supporting Comments' section.

**Overall Rating** Rating: Successful

**Supporting Comments**

Use this comment box to provide specific examples that support your Success Factor ratings. A comment is required.

**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.



# Review: Save Changes

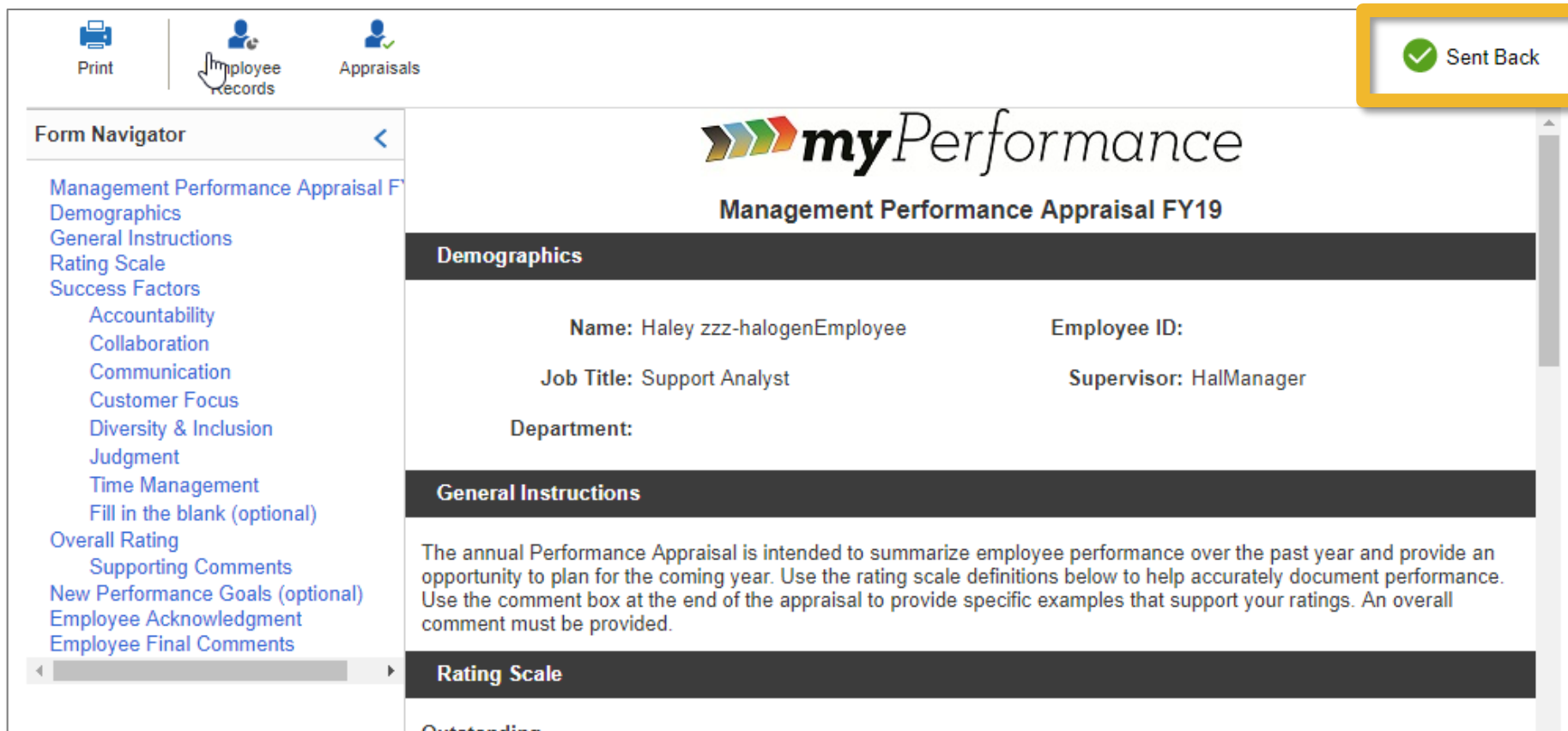
- To continue your review at a later date, choose **Save Changes**

The screenshot displays a web-based performance appraisal review interface. At the top, there is a navigation bar with several icons and labels: 'Print', 'Spelling', 'Check Language', 'Employee Records', 'Appraisals', 'Save Changes' (highlighted with a yellow box), 'Return to Author', and 'Approve'. Below this is a 'Form Navigator' on the left side, listing various sections of the appraisal form: '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)', and 'Overall Rating'. The main content area shows the 'Overall Rating' section with a 'Rating: Successful' status. Below this is the 'Supporting Comments' section, which includes instructions for providing specific examples that support the ratings. A note indicates that an overall comment must be provided. The interface also includes a 'Self:' section and a '\* Comments:' section, both with instructions for providing specific examples. A note at the bottom of the comments section states: 'Second level approvers can directly edit comments.'



# Review: Return to Author

- **Return to Author** sends the appraisal back to the evaluator
- It will be re-submitted for second level approval



The screenshot shows the 'myPerformance' interface for a 'Management Performance Appraisal FY19'. The top navigation bar includes 'Print', 'Employee Records', and 'Appraisals'. A 'Sent Back' button with a green checkmark is highlighted in a yellow box. The form is divided into sections: 'Demographics', 'General Instructions', and 'Rating Scale'. The 'Demographics' section contains the following information:

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

The 'General Instructions' section contains the following text:

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, showing the word 'Outstanding'.



# Review: Approve

- **Approve** returns the appraisal to the evaluator to be delivered

Review appraisals for second level reports Help ✕

Haley zzz-halogenEmployee

FY19 Appraisal Process  
By Hal zzz-halogenManager

Print    Spelling    Check Language    Employee Records    Appraisals    Save Changes    Return to Author    Approve

Form Navigator < \*Indicates required field

- 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)
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**myPerformance**

### Management Performance Appraisal FY19

**Demographics**

Name:  Employee ID:

Job Title:  Supervisor:

Department:

**General Instructions**

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**Rating Scale**

