Step-By-Step Guide

Bullseye Performance Management Tool

Manager Edition
# Table of Contents

I. **Starting the Review Cycle: Setting Goals for Employees (Optional)**  
   Page 4

II. **Completing the Mid-Year Review**  
    Page 11

III. **Completing the Year-End Review**  
    Page 16

IV. **Reviewing Upward Feedback (360)**  
    Page 24

V. **Additional Tools**  
   Page 27
   I. **Check-Ins**  
      Page 28
   II. **Comments Writer**  
       Page 30
   III. **Taking Notes**  
        Page 31
   IV. **Adding Documents**  
       Page 35
   V. **Historical Documents**  
      Page 37
   VI. **Reports**  
       Page 38
You are encouraged but not required to begin the performance management cycle by creating goals for your employees. This will help drive feedback when completing both the Mid-Year and Year-End evaluations throughout the year. Both Mid-Year (Check-In) and Year-End (Appraisal) forms will be automatically created for you in the Bullseye Performance Management system. If any of these forms are missing for your employees, reach out to the Talent Management Team.

The Performance Management Cycle consists of the following:

1. Starting the Review Cycle: Setting Goals for Employees (Optional)
2. Completing the Mid-Year Review
3. Completing the Year-End Review
4. Reviewing Upward Feedback (360)
5. Additional Tools
   1. Check-Ins
   2. Comments Writer
   3. Taking Notes
   4. Adding Documents
   5. Historical Documents

For questions or concerns please contact Talent Management at talent.management@emory.edu
Goals are optional but highly recommended. Goals help focus the conversation when completing the mid-year and year-end forms for your employees. With goals, you are able to specify what you want your employee(s) to accomplish. The progress of goals can be measured in different ways: measured, complete/incomplete, or target value. Updates and feedback on goals can be provided throughout the year from you and your employee(s). Your employee also has the option to create goals for themselves, and you can then approve or reject them.

For questions or concerns please contact Talent Management at talent.management@emory.edu
1) To begin the goals process for your employee, go to the Self-Service login page where you will be directed to the HR Portal.

2) Select the Talent Mgt (incl. Performance) tile. You will need to log in with your Emory credentials to access the Performance Management site.
3) On your homepage, at the top bar select goals and manage employee goals.

4) All current, past or requested goals from your employee’s will be visible under the manage employee goals. To create a goal for your employee, you will need to select **assign goals**. If you would like to approve a requested goal from an employee, go to step 11.

5) Under **My Direct Reports**, you will be able to view your employees only. Under the regular goal dropdown, select other and click the green plus sign.
6) A pop-up box will appear where you will need to fill out the goal name, progress type, importance and start/end date. All other criteria is optional. Once complete, select add where you will need to assign the goal.

- **Complete/Incomplete**: goals that are measure by whether they have been completed or not.
- **Measurable**: progressive based goals with a completion percentage up to 100%.
- **Target Value**: Goals with a set value of achievement.
- **Goal Weight (Optional)**: Alternative means for a user to assign priority to a goal.

7) If you would like to make edits to the goal, select the pencil icon to make any edits. If you would like to create another goal; then, repeat the process again by selecting the green plus icon. Before you assign the goal, make sure to select the employee(s) name, and click assign.
8) If you would like to view the goal you created, go back to your home screen, and select the “goals” icon on the employee’s row.

9) A pop-up box will appear where you can view all current and archived goals. Select edit to make any changes to the goal. Select update to view, and provide comments, on the goal between you and your employee. You can also select “View Comments” to view all comments made to date.
10) You can provide any comments for your employee to view. Once you select update, the comments will be sent back to your employee to view where they can provide feedback. Continue to provide feedback on the goal until it has been completed. Once you are ready to complete the goal, select “mark as completed” or adjust the progress bar. The goal will continue to stay visible, completed or not, until the due date has passed where it will be archived.

11) To approve/reject a goal submitted from one of your employees, go to goals and manage employee goals. Go to the pending approval goals tab. You will be able to view the requested date, goal name, measure and status. Select view to view all details of this goal.
12) Here you can view all information that was provided from your employee. If you would like, you can add a comment on this goal. If not, approve or reject this goal. If you reject the goal, the goal will be sent back to your employee with a rejected status. It is important to discuss with your employee why their goal was rejected.

13) If approved, the employee's goal will be visible under the current goals.

14) In the performance management system, there is an option to create cascading goals for your direct report(s). If you would like to create a cascading goal, please contact the Talent Management Team.
The mid-year review form is a type of form known in Bullseye as a “check-in,” and is accessible at any time during the first six months of the review cycle. This allows you and your employee(s) to take notes whenever desired. You don’t have to wait to record your accomplishments; simply record noteworthy events as they happen. You can also use the provided “notes” tool. For more on the notes and check-in tools, go to Section V of this document.

Mid-year forms will be scheduled automatically for your direct reports. The main advantage of the Mid-Year Review is to provide important feedback in a more timely manner than waiting until the end of the year. For the mid-year check-in, the self-evaluation only requires comments for Overall. You do not have to provide comments on any competencies you do not wish to comment on (although recommended).

**Why is it important to take notes and document continuously?**
- Taking notes throughout the year makes the process easier
- Takes less time to complete your review
- Providing detailed documentation closer to an event is more accurate

**You should record your notes under one of the Emory Competencies:**

**WHAT: Competencies that speak to what you do in your job**
- Delivering Results
- Problem Solving
- Functional Knowledge & Skills
- Service to Others/Customers

**HOW: Competencies that speak to how you do your job**
- Diversity, Equity and Inclusion
- Collaboration
- Communication
- Taking Initiative

For questions or concerns please contact Talent Management at talent.management@emory.edu
1) To begin the mid-year process for your direct reports, go to the Self-Service login page where you will be directed to the HR Portal.

2) Select the **Talent Mgt (incl. Performance)** tile. You will need to log in with your Emory credentials to access the Performance Management site.
3) You will be directed to your home dashboard. Navigate to the check-in section where you will be able to see who has a scheduled Mid-Year form. Select **In Progress** to view the form. (If there is not a Mid-Year form, please reach out to the Talent Management Team.)

4) Select view to begin the Mid-Year process after your employee has added comments. Any previously created check-in, or general feedback, forms will be visible in this section.
5) On the form, you can provide comments for each competency and for Overall; only Overall is required. If you need help writing comments; select the view criteria link where you will be directed to the behavioral examples. Select your overall score and provide any documents that are valuable to their mid-year. If you are not ready to share with your employee, select the save draft button.

6) If you are ready to share, select the share button. The form will be sent to your employee where they can provide any additional feedback, and sign off, on their form. If you would like, before they sign off, you can have a 1 on 1 discussion about their mid-year.
7) Once your employee signs off on their mid-year, the form will be sent back to you. Select the sign-off button to complete the mid-year process.
Performance Management User Guide
Manager’s Edition: Completing Your Year-End Review

The self-evaluation form for the Year-End review should be available shortly after the middle of the year (either November or March depending on whether you are on the academic or fiscal year calendar). To complete their annual appraisal, you should review your notes/goals on your employee(s), their Mid-Year Review, your employee’s self-evaluation, and if the employee has direct reports, any upward feedback (360). After you have reviewed their forms; then, you should provide comments and ratings on the employee’s year-end form. You should not submit the form until you have had a face-to-face discussion with the employee first.

All year-end appraisals will be automatically scheduled for the year. If your employee does not have a scheduled appraisal, reach out to the Talent Management Team and we will be able to assist with creating their form.

The following information will be needed to create their year-end appraisal if missing:

1. Type of form needed: Leader, Manager, Non-Manager, or Six-Month Form
   - If Six Month Form – provide their Hire Date
2. Employee Name
3. Employee ID Number

*Please refer to the Employee User Guide on how to complete the self-review for yourself.

For questions or concerns, please contact the Talent Management Team at talent.management@emory.edu
1) All appraisals will be automatically scheduled for the annual evaluation period. Your employee will receive an email informing them to complete their self-evaluation. To access the Performance Management system, go to the Self-Service login page where you will be directed to the HR Portal.

2) Select the Talent Mgt (incl. Performance) tile. You will need to log in with your Emory credentials to access the Performance Management site.
3) Once logged in, you will land on your dashboard homepage. Navigate to the appraisal section to begin the appraisal process.

![Appraisal Section](image)

4) Since all forms will be automatically scheduled, you will have the visibility to view the appraise button. (If there is no appraise button on your employee, reach out to the Talent Management team as we will need to create the appraisal for the employee.) Select **appraise** where you will begin their evaluation.

![Appraisal Button](image)
5) As you view the competencies, select which rating best describes the employee. If you are unsure on how to rate them, select the **view criteria** link where you will be able to read a brief description of the competency along with example behaviors at different levels of performance. Ratings of 1, 2 and 5 require comments, but comments are encouraged regardless of rating. The Overall Score also requires comments.

6) Diversity, Equity and Inclusion is a new competency for FY23. All Non-Manager and Manager forms will have it listed as a required text box at the bottom of their appraisal. All **leader** forms will have it listed as another competency that requires a rating.
7) If you would like assistance writing comments, scroll to the bottom of the appraisal and select **comments** to use the Comment Writer tool (for more information go to section V of this document). There are several comment categories to choose from. Once you have added all your comments, select save & close.

8) On the year end appraisal, documents that have been uploaded to your employee’s profile will be visible at the top of the screen. If you would like to upload additional documents for the appraisal itself, scroll to the bottom of your appraisal and select the review documents button. Select close when you have finished adding your document(s).
9) The year-end evaluation process cannot be completed until all forms have been submitted or expired: self-evaluation and Upward Feedback (360; if provided/applicable). If the additional forms have not been submitted or have not yet expired; then, you will need to save draft until ready. See section IV to learn more about the Upward Feedback (360) tool.

10) Once all forms have been submitted to you; go back to the appraisal section and select your employee. From there, you will be able to view your employee’s self-review and upward feedback (360; if provided). When you’re ready, you can select submit where the year-end appraisal workflow will begin. You should not submit until you have first had a face-to-face meeting with the employee.

11) Once the form has been submitted, it will go to your direct report where they are able to view your comments, acknowledge their year-end evaluation and add any additional feedback in response to your evaluation. You will receive a notification informing you if they acknowledged the form and if they submitted any feedback in response to your evaluation. Reminder: you should not submit the form for acknowledgement and/or response until you have first had a face-to-face meeting with the employee.
12) On your dashboard, navigate to appraisal and then pending approvals. Select the **approve/reject** button to view any comments provided from your employee.

13) Go to the bottom of your appraisal and select comments to view any feedback from your employee. Comments from your employee will say *feedback comments*.
14) If you would like to provide additional comments; then, you will add them as you did in Step 7. If not, select the approve or reject button. If approved, go to step 16. If rejected, go to next step.

15) Rejecting a form is used sparingly. Please contact the Talent Management team if you need to reject a form as we will help you complete the process.

16) Once you approve the form, you can add additional comments if you choose. If not, the form will go to the completed section. The year-end form has now been completed!
At Emory, staff members may* have the opportunity to provide feedback about their supervisor to their supervisor’s leader regarding strengths and any areas for development. Staff members have the opportunity to provide feedback about their supervisor to their supervisor’s leader by answering three questions:

1. What do you see as your supervisor’s greatest strengths? Please consider the Emory competencies and behavioral examples.

2. What area(s) do you think your supervisor should develop in order to be more effective? Please consider the Emory competencies and behavioral examples.

3. Are there other comments about your supervisor that you would like to share?

Providing the 360 Review feedback is entirely optional but strongly encouraged. All feedback is kept anonymous and sent directly to the supervisor’s leader, not the supervisor. If you receive 360 feedback on the person you are evaluating, you are asked to use the 360 feedback in combination with your own observations and other data points. Never give the 360 comments directly verbatim to the person you are evaluating.

How to write comments: If you are asked to provide comments about your own supervisor, when responding to these questions, it is easy to reflect on only your most recent interactions with your supervisor; but, it is best to think collectively of your supervisor’s behavior throughout the year. Reflect on strengths and any areas that can help them improve. If you have suggestions for improvement, explain why you would like changes and why these things are important to you or how changes would add value. Also, write responses that are specific but not so detailed that you could be easily identified.

For questions or concerns please contact Talent Management at talent.management@emory.edu

*If you supervise a manager with two or more direct reports, then you are required to provide those individuals the opportunity to share feedback about that manager with you. The system does this automatically.
1) When year-end evaluations are scheduled; all managers/leaders who have two or more direct reports should receive the upward feedback (360) form. If these criteria are met and employees did not receive an upward feedback (360) form please reach out to the Talent Management Team. As a reminder, all upward feedback (360) will only be visible to the supervisor’s leader. To view the comments provided from the direct reports, please follow the steps below.

2) Begin by going to the Human Resources page and selecting “Self-Service Login.”

3) Select the Talent Mgt (incl. Performance) tile. You will need to log in with your Emory credentials to access the Performance Management site.
4) After you log in you will land on your dashboard. Select the appraisal section and select **appraise** to view the upward feedback (360) form.

5) Only one employee needs to respond to have access to view the upward feedback (360) comments. Once someone has submitted a upward feedback (360) form, select the Review 360 button.

6) A pop-up box will appear where you can view how many upward feedback (360) forms that have been submitted. Select view and review the responses provided. Since only comments are provided, the “Rating” score will read 0.00. Please ignore.
Performance Management User Guide
Employee (Manager) Edition: Additional Tools

Check in Tool: What is a Check-In? Why do it?
• Allows you to have a general discussion with your manager that does not affect your mid-year or year-end evaluations
• Open discussion with no limit until you are ready to end the discussion

Comment Writer Tool: Why use the Comment Writer?
The comment writer has multiple categories with pre-written text that can be used to help you complete your evaluations.

Notes Tool: Why is it important to take notes and document continuously?
• Taking notes throughout the year makes the process easier
• Takes less time to complete your review
• Providing detailed documentation closer to an event is more accurate

Adding Documents
This section inform you on how to add documents through your profile.

Historical Documents
This section allows you to view your previous year-end and self-review evaluations for the past 3 years.

Reports
This section provides information on the different reporting documents to view.

For questions or concerns please contact Talent Management at talent_management@emory.edu
1) **Check-In Tool:**
If you would like to create a General Feedback Check-In, go to your home dashboard and select my check-in.

![Dashboard screenshot](image)

2) Then, select the **initiate** button.

![Check-In button](image)
3) As there is only one form in the drop down, select the general feedback form and **assign**. General feedback allows you and your employee to have an open discussion on any topic you would like. You can continue to keep this form open until you are ready to end the conversation.

4) This form is similar to the mid-year form; however, there is no overall score. General feedback allows you and your employee to have an open discussion on any topic you would like. You can continue to keep this form open until you are ready to end the conversation. When you are ready to share your comments with your employee, select the **share** button at the top. This will allow you to submit your form to them. If you are not, uncheck the share check in button at the bottom of the screen and select the **save draft** button. The form will not be submitted until you are ready to share. Sign off on your form when this conversation has been completed.
5) **Comment Writer Tool:**
The comment writer is only visible in the year-end evaluation forms (self and year-end appraisal). If you would like to use the comment writer, go to the bottom of the year-end evaluation, select comments and choose the category you would like to select a comment from. Or, select general comments to provide your own personal comment.

6) When you find your comments, select the add button where they will appear on the right. You can copy these comments and add them wherever you see fit, throughout the year-end form. Select save & close to save your comments.
7) After you copied the comment from the Comment Writer tool, select the pen and paper icon that is in the competencies. Paste the comment and save.

8) **Notes Tool:**
To create your own personal notes, go to your home dashboard and select **My Notes**.
7) From here, select add notes.

8) Under the title dropdown, there will be multiple categories to choose (same as Comment Writer Tool) to help you create your own notes. Select the prepopulated note you like, or create your own note, and select save/update.
9) Your note will now be visible under your notes on your dashboard. The notes you create are not visible to anyone but you.

10) To create a note for/about your employee, go to your dashboard and select notes on their employee row.
11) Select the add notes button where you will be able to type your own notes and view all the pre-written text from the Comment Writer tool..

12) Select the drop down to view all available categories, including general comments, with the pre-written text. Modify as you see fit or simply write your own. If you would like for your employee to view your note, unselect the note can not be reviewed by member. If you would like for this note to stay visible after you are no longer their manager, select the note can be seen by future managers. Once you have added your notes select the save/update button.
13) To view the notes you have created, go back to your dashboard and select the notes on the employee’s row. The notes that you have created will now be visible.

14) **Adding Documents**
To add documents to your profile, on your home dashboard, select the edit button.
15) Navigate to the documentation tab and you can upload your documents. Provide a document name, choose a document type and choose your file. If you would like, you can provide a description for the document. Select save/update.

16) Now on your profile, the documentation link will be visible for your direct manager, manager level ups of your direct manager and admins/privileged users. Peers are not able to view your profile.
17) **Historical Documents**
If you would like to view your direct report(s) previous evaluation(s), on your dashboard select “Appraisal” on their row.

18) Their appraisal history is now visible. Their rating will be visible for all evaluations for the past 3 years. Just a reminder, that the rating column displays the average across the competencies and **not** the final score assigned. You will need to open the actual form to view their final score. The self review does not have ratings; but you can view their form within their evaluation. Select the view button to read both their year-end and self review.
19) **Reports**
To pull a report, go to the reports drop down and select a report you would like to view.

20) **At A Glance Reports**
Provides a visual of your department's performance status, appraisal status, goals and check ins.

21) **Appraisal Status reports** is the most likely report you will want to use, to view the appraisal status of your employee’s.

- **Member Performance** – allows you to view completed appraisals for your employees within one document.
- **Performance Summary** – another breakdown to view completed appraisals for your direct report.
- **Member Performance Comparison** – allows you to view the completed year-end scores for all members in your department.
- **Self Review** – allows you to view completed self-reviews from your direct reports.
- **Pending Approval** – allows you to view what forms are waiting for you to approve in the pending approval section.
- **Statistics** – provides a visual report on the employee you selected.
- **Appraisal Status** – detailed report, including historical reviews, on your employee’s.
22) Select the appraisal status report. Select summary, change the department to your specific department, change review if you would like to view a specific review (manager review, self review, etc), and select the start and end date. Once completed, select the get report button.

![Appraisal Status](image)

23) A detailed summary will be visible providing the name, department, manager name, assigned appraisal date, status update for: manager review, self review, 360 review. If an appraisal score has been added; then, this will be visible. You can also view the approval workflow status or the pending member workflow.

24) If you would like to view the appraisal document for the employee, select the hyperlink under the appraisal date.

25) **Organization Reports** will have different reports outside of appraisals.

- **Member Management:**
  - **Members Detail:** allows you to view details from the employee’s profile information.
  - **Document Detail:** allows you to view documents that have been uploaded.

- **Check In:** allows you to view information on scheduled, or ad hoc, check ins.

- **Goals**
  - **Member Goals:** allows you to view goals on your direct reports.
  - **Department Goals:** allows you to view goals created for your department.