STEP-BY-STEP GUIDE

BULLSEYE PERFORMANCE MANAGEMENT TOOL

MANAGER EDITION

EMORY +YOU

Your Learning

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INTRODUCTION TO PERFORMANCE MANAGEMENT

You are encouraged, but not required, to begin the performance management cycle by creating goals for your employee(s). 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 employee(s), reach out to the Talent Management Team.

The Performance Management Cycle consists of the following:

- Starting the Review Cycle: Setting Goals for Employees
- (Optional)
- Completing the Mid-Year Review
- Completing the Year-End Review
- Reviewing Upward Feedback (360)
- Additional Tools
    1. Check-Ins
    2. Comments Writer
    3. Taking Notes
    4. Adding Documents
    5. Historical Documents
    6. Reporting
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For questions or concerns please contact Talent Management at talent.management@emory.edu

PERFORMANCE MANAGEMENT USER GUIDE

MANAGER'S EDITION: STARTING THE REVIEW CYCLE: SETTING GOALS FOR EMPLOYEES (OPTIONAL)

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.

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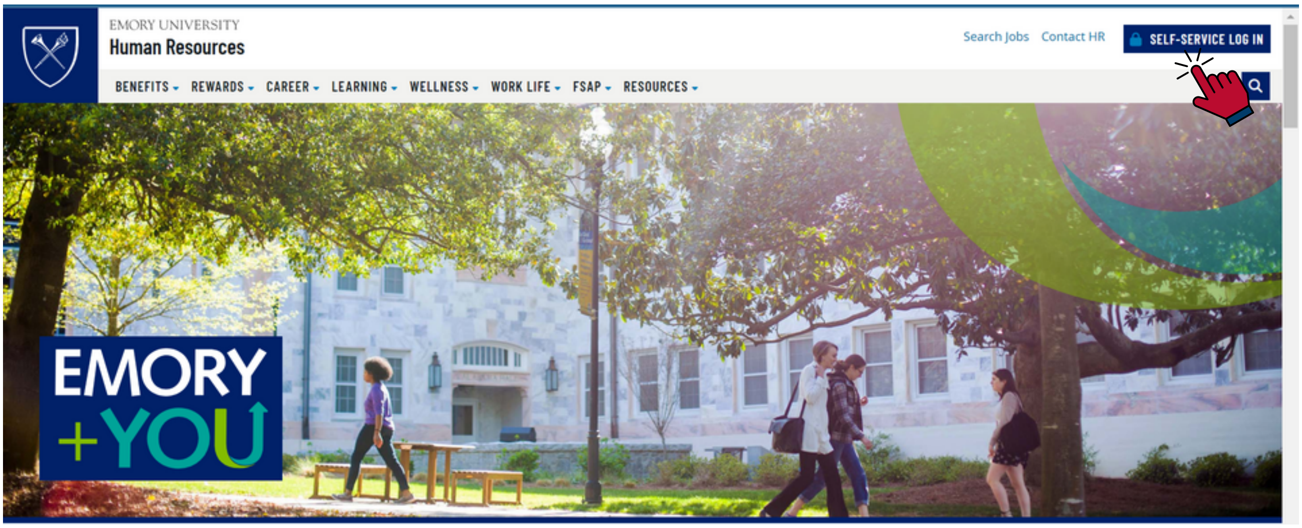
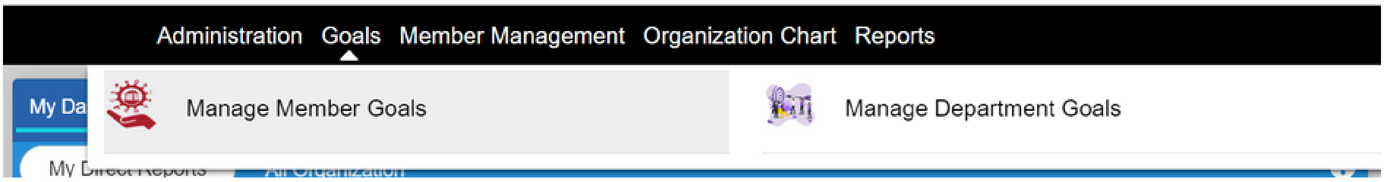
1. To begin the goals process for your employee, go to the Self-Service login page where you will be directed to the HR Portal.

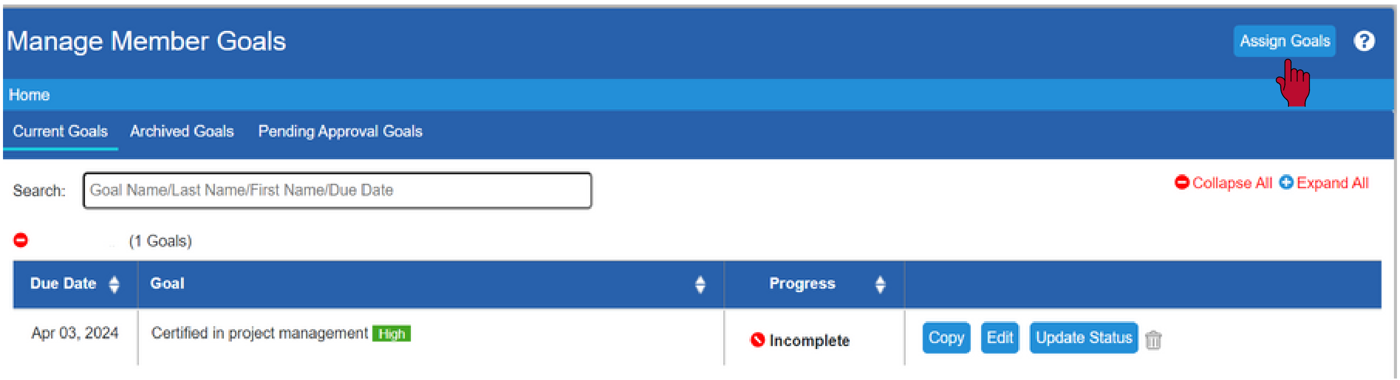


2. Select the **Talent Mgt (incl. Performance)** tile. You will need to log in with your Emory credentials to access the Performance Management site.

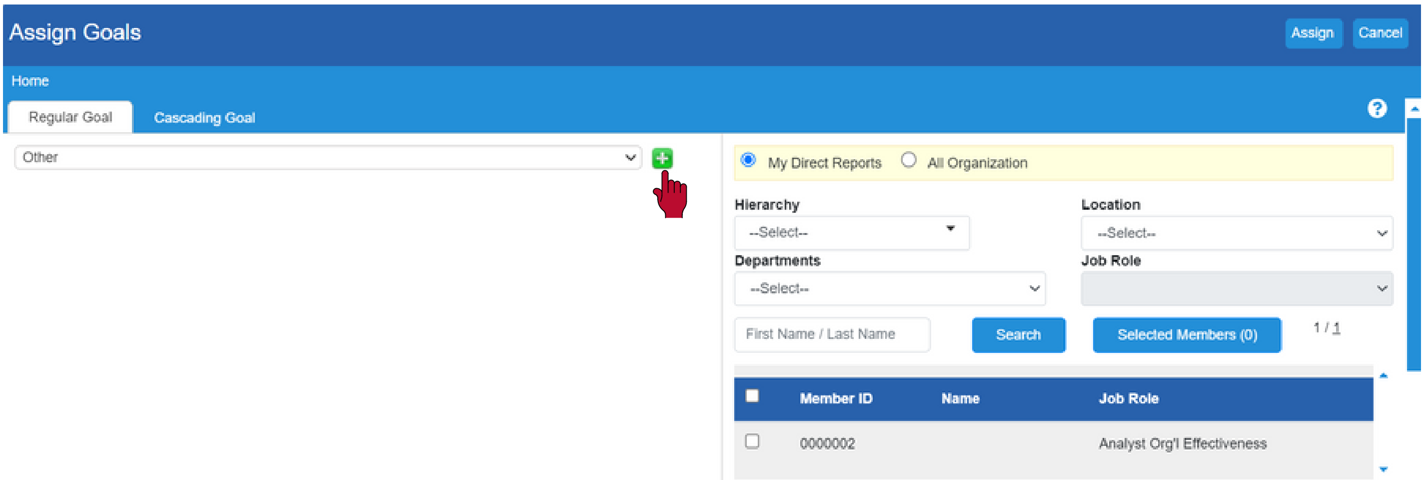
3. On your home dashboard, on the top bar, select *goals* and *manage member goals.*



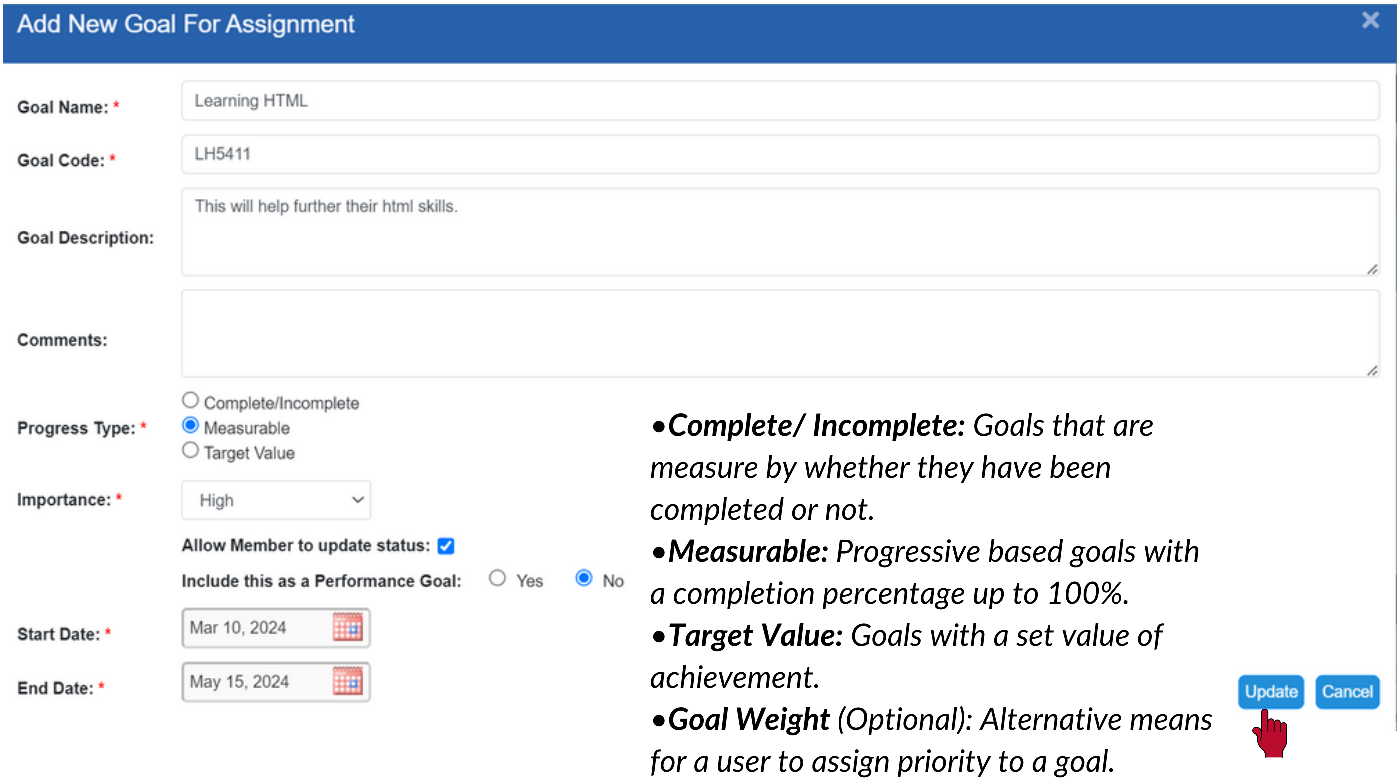
4. All current, past or requested goals from your direct reports will be visible under the *manage member goals*. To create a goal for your direct report, you will need to select **assign goals**. If you would like to approve a requested goal from your direct report, go to **step 11**.



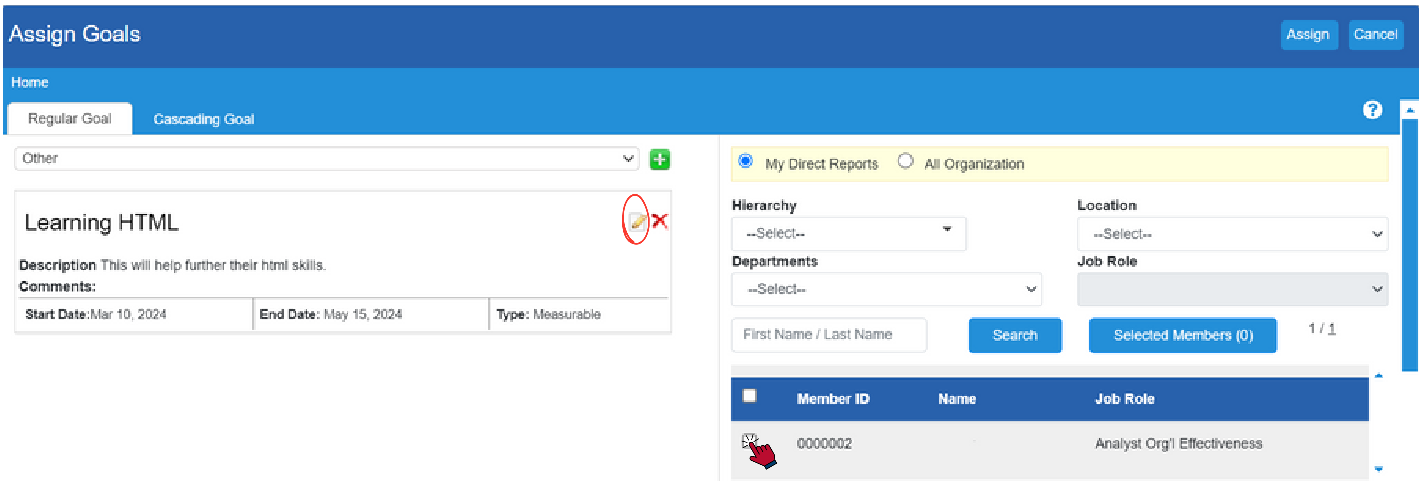
5. Under *My Direct Reports*, you will be able to view your employees only. Under the regular goal dropdown, select *other* and click the green plus sign.



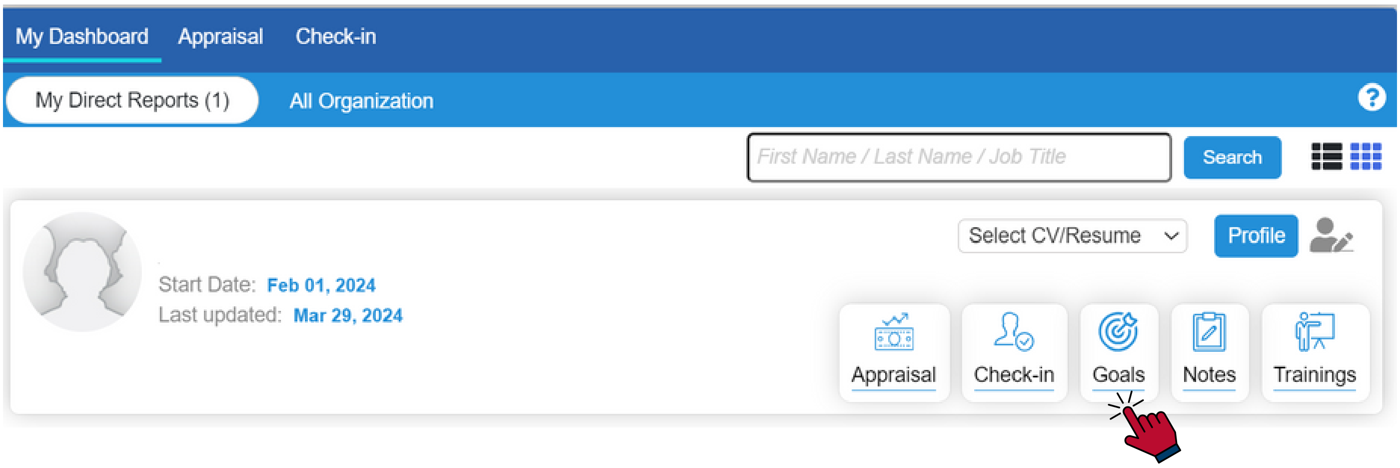
6. A pop-up box will appear where you will need to add the *goal name, progress type, importance and start/ end date*. All other criteria is optional. Once complete, select ***update*** where you will need to assign the goal.



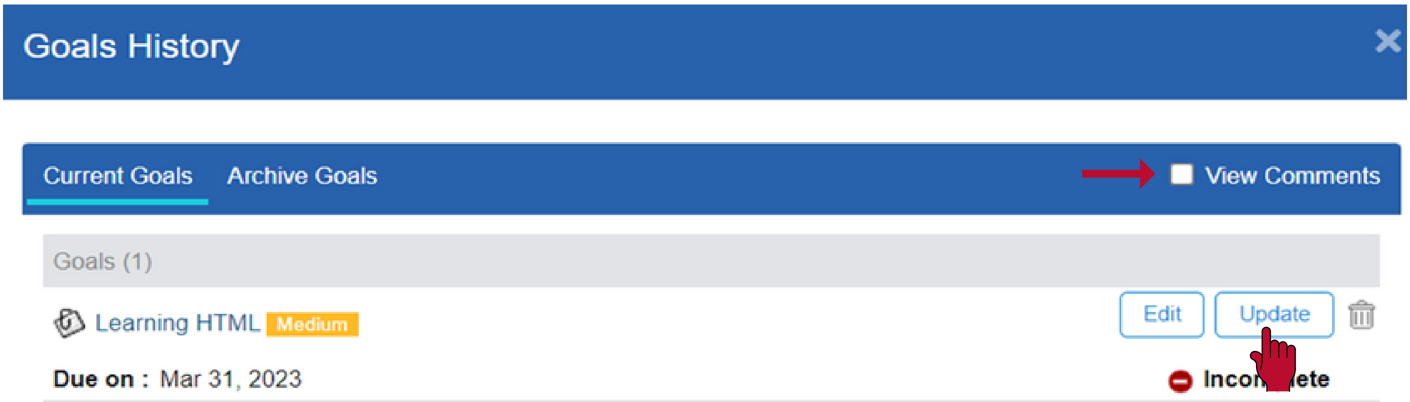
7. If you would like to make edits to the goal, select the *pencil icon*. If you would like to create another goal; then, repeat the process again by selecting the green plus icon. Before you assign the goal, make sure to select the employee(s) name, and click ***assign***. A pop-up box will appear confirming that you are ready to assign the goal to your direct report, select ***yes***. The goal has now been assigned!



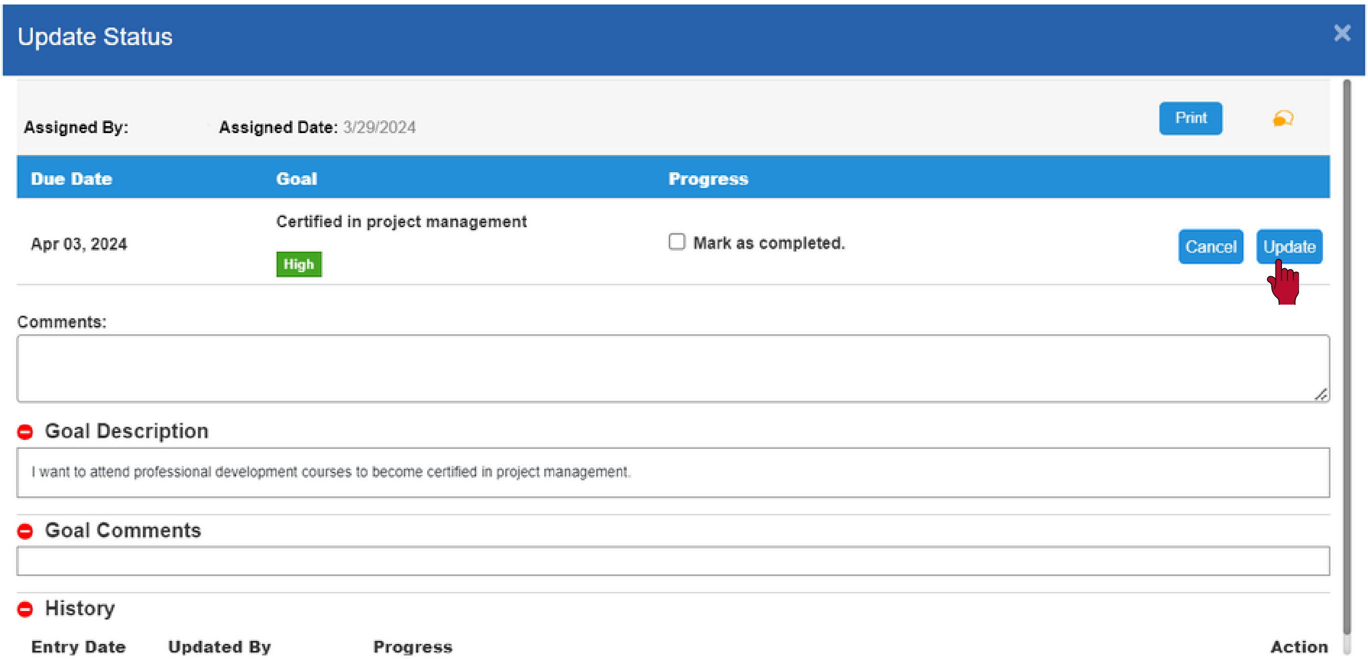
8. If you would like to view the goal you created, go back to your home dashboard, and select the *goals* icon on the employee's row.



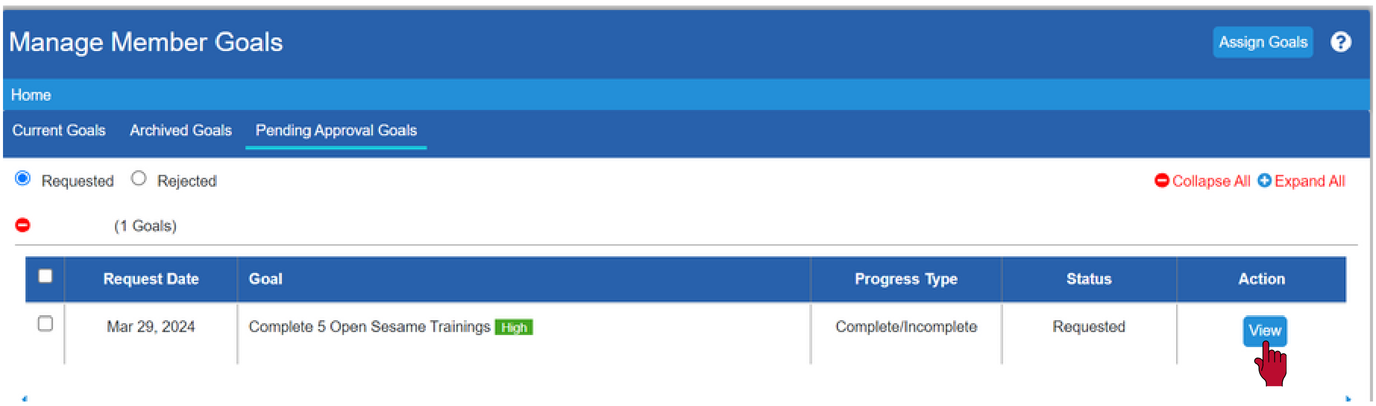
9. A pop-up box will appear where you can view all current and archived goals. Select ***edit*** to make any changes to the goal. Select ***update*** to view, and provide comments, on the goal between you and your direct report. You can also select *View Comments* to view all comments made to date.



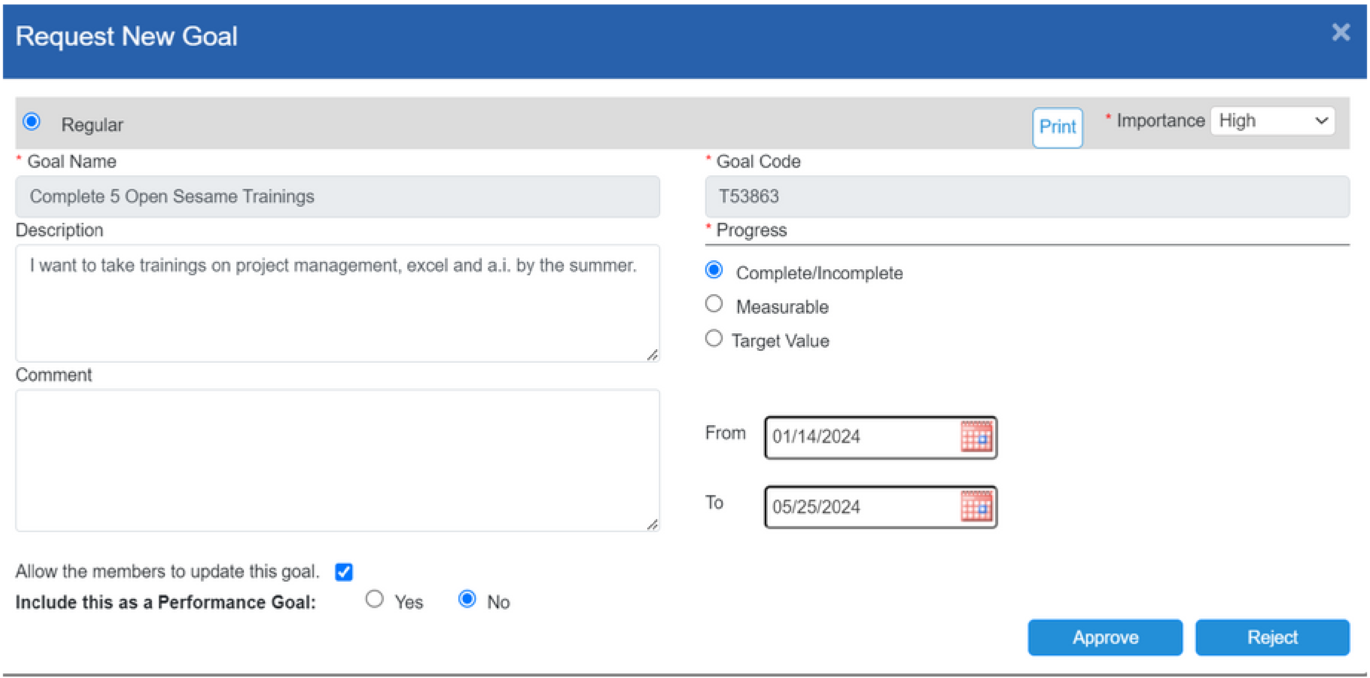
10. You can provide comments for your direct report to view. Once you select ***update***, the comments will be sent back to your direct report to view where they can provide comments. Continue to provide comments on the goal until it has been completed. Once you are ready to complete the goal, select 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.



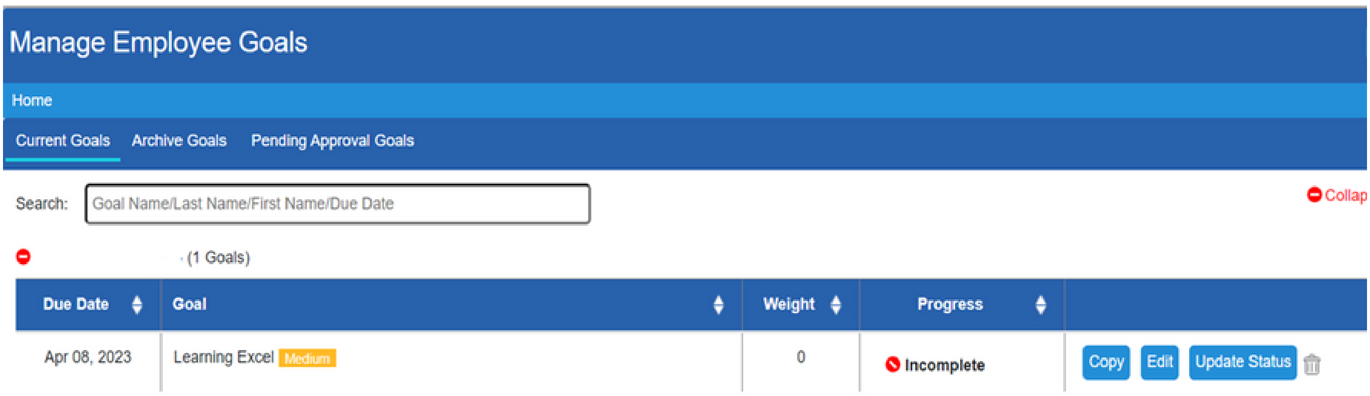
11. To *approve/reject* a goal that has been submitted, go to *goals* and *manage employee goals*. Go to the ***pending approval goals*** tab. You will be able to view the requested date, goal name, progress type and status. Select ***view*** to view all details of this goal.



12. This is where you can view all information that was added from your direct report. If you would like, you can begin to add comments on this goal. If you do not want to add comments; then, either *approve* or *reject* the goal. If you *reject* the goal, the goal will be sent back to your direct report with a rejected status. It is important to discuss with your direct report why their goal was rejected.



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



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.

PERFORMANCE MANAGEMENT USER GUIDE

MANAGER EDITION: COMPLETING THE MID-YEAR REVIEW

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 is completely optional. 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

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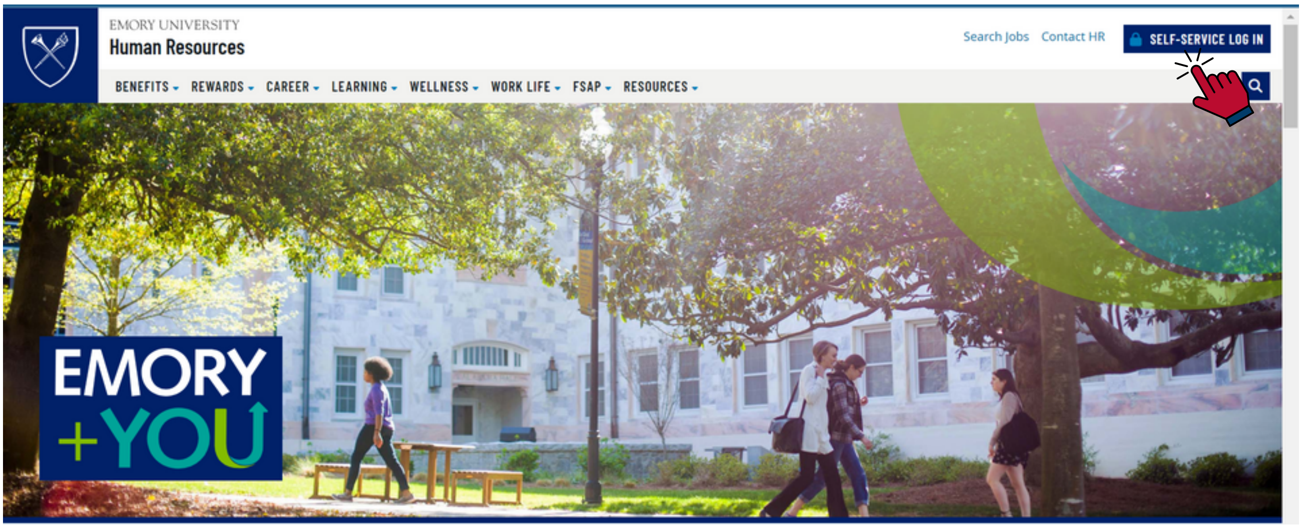
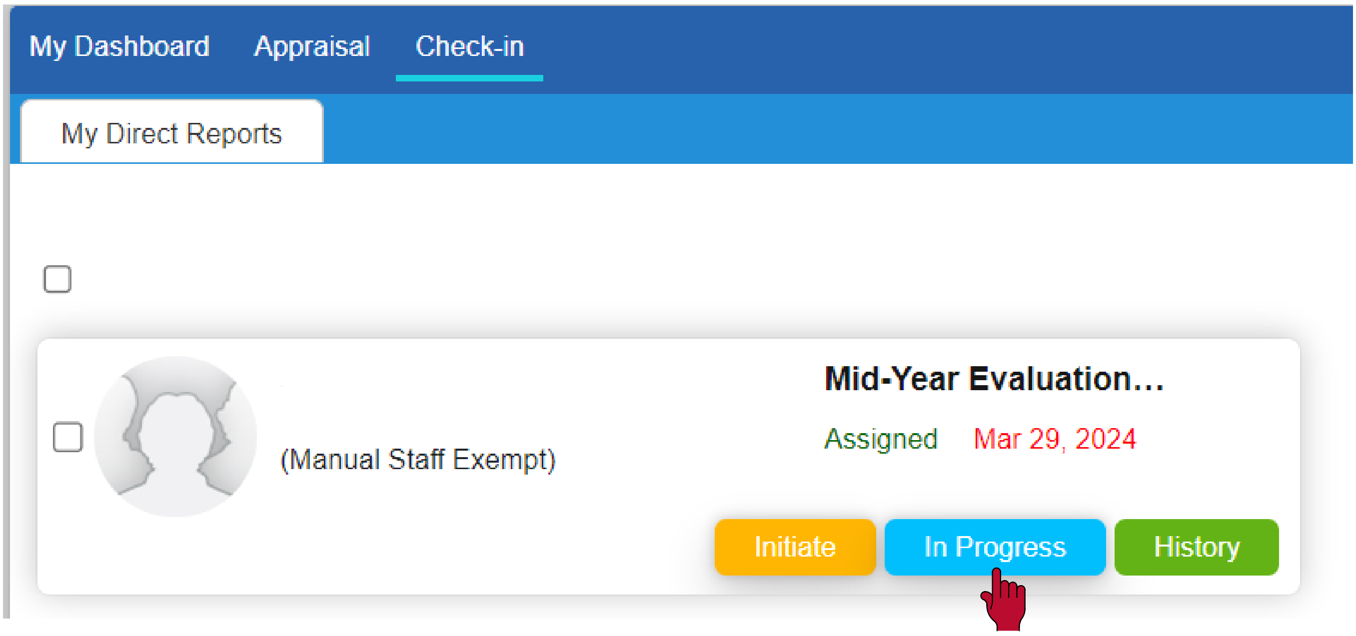
1. To begin the mid-year process for your direct reports, go to the Self-Service login page where you will be directed to the HR Portal.

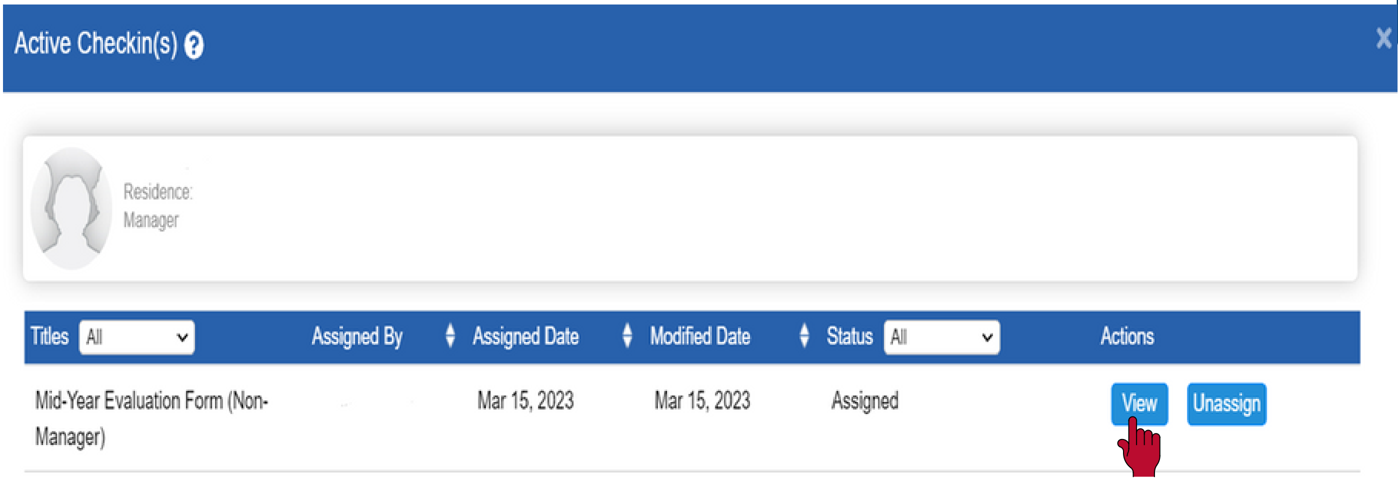


2. Select the **Talent Mgt (incl. Performance)** tile. You will need to log in with your Emory credentials to access the Performance Management site.

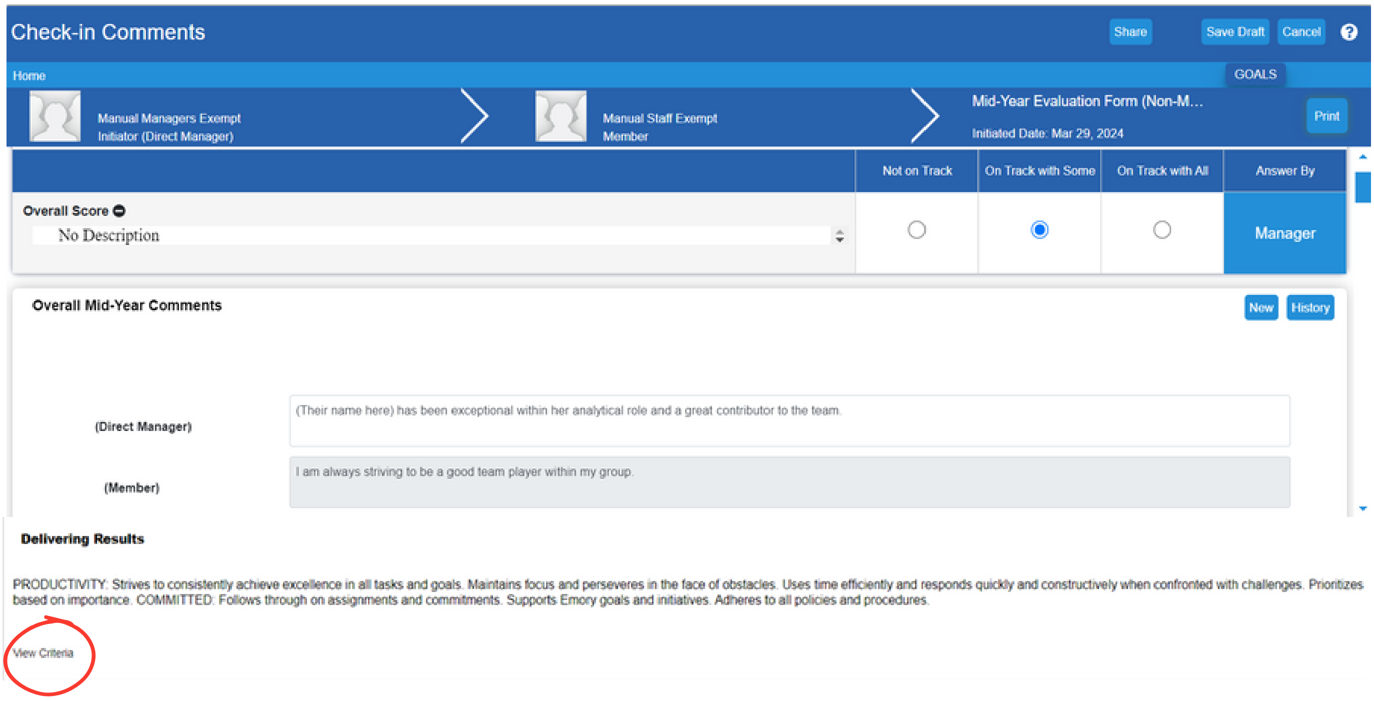
3. On your home dashboard, navigate to the **check-in** section where you will be able to view who has a scheduled mid-year check-in. Select In Progress to view the mid-year. (*If there is not a mid-year check-in, please reach out to the Talent Management Team.*)



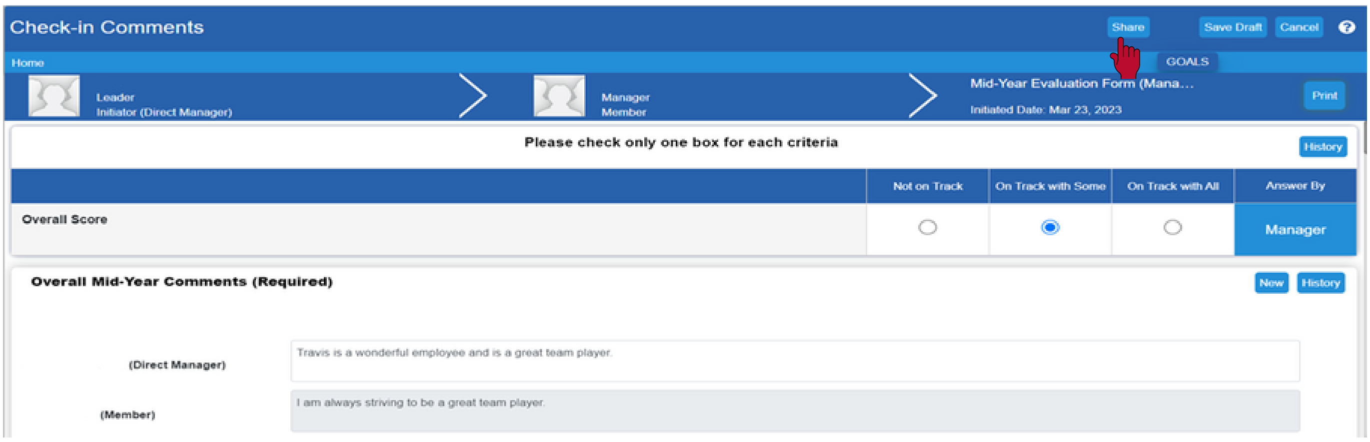
4. Select ***view*** to begin the mid-year process, after your direct report has added comments. Any previously created check-ins, or general feedback, check-ins will be visible in this section.



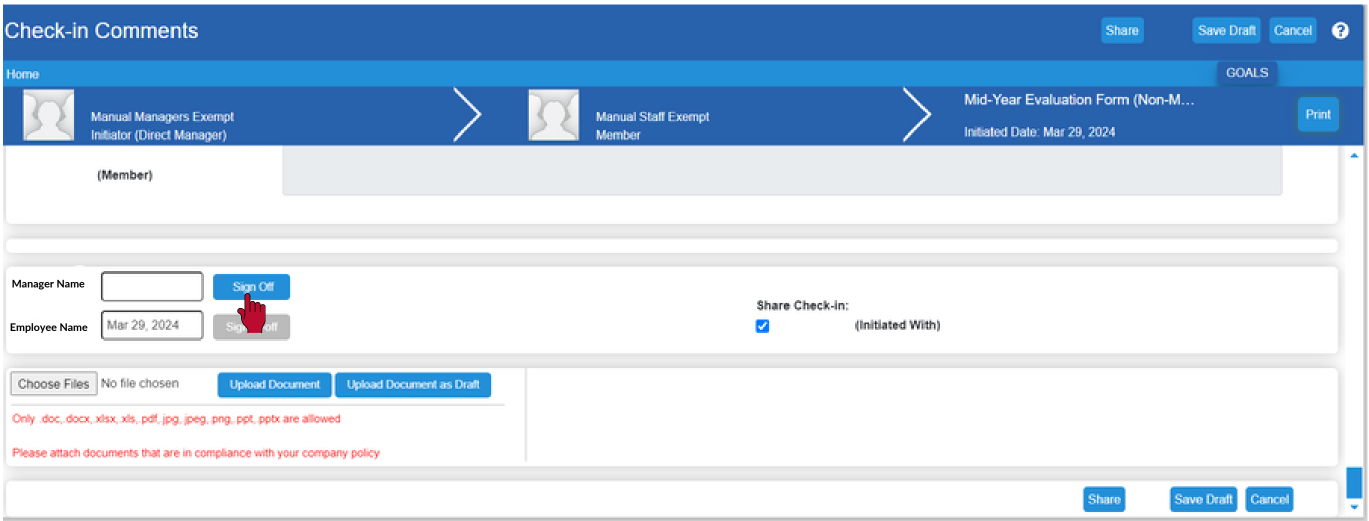
5. On the check-in, if you choose, you can begin to provide comments for each competency. If you need help writing comments; select the *view criteria* link where you will be directed to the behavioral example for that competency. Select their overall score and provide any documents that are valuable to their mid-year. If you are not ready to share with your employee; then, select the ***save draft*** button.



6. If you are ready to share; then, select the ***share*** button. The check-in will be sent to your direct report where they can provide any additional comments to their mid-year. It is recommended to have a 1 on 1 discussion about their mid-year before signing off.



7. Once your direct report signs off on their mid-year; then, the mid-year will be sent back to you for your sign off. Select the ***sign-off*** button to complete the mid-year process. **(Please remember to sign off when you, or your direct report, no longer need to add comments. We cannot reopen mid-year forms.)**



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MANAGER 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 April or May 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.

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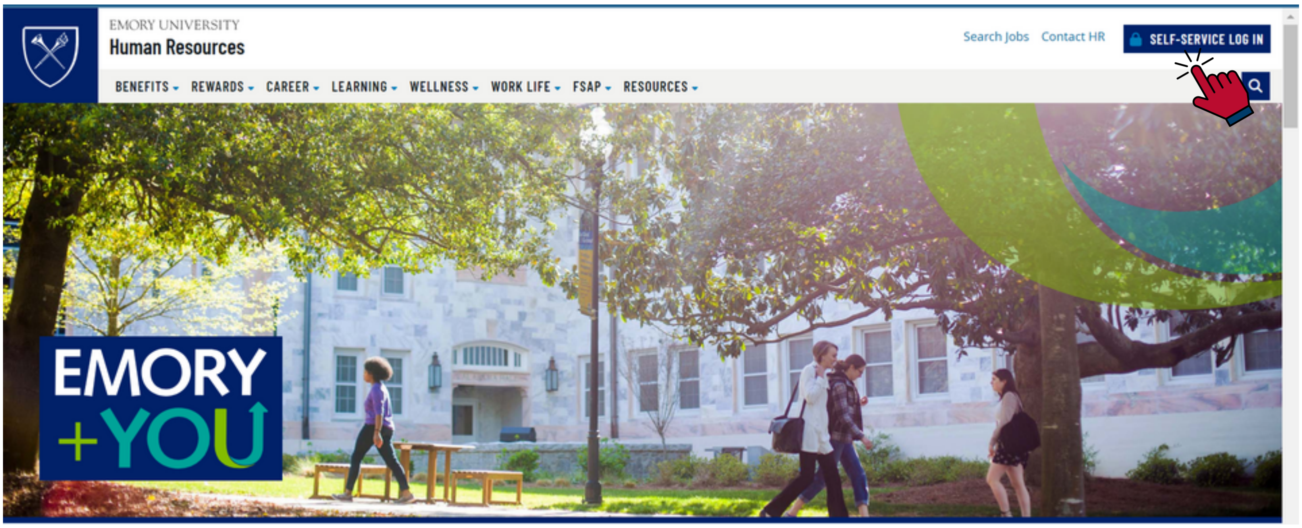
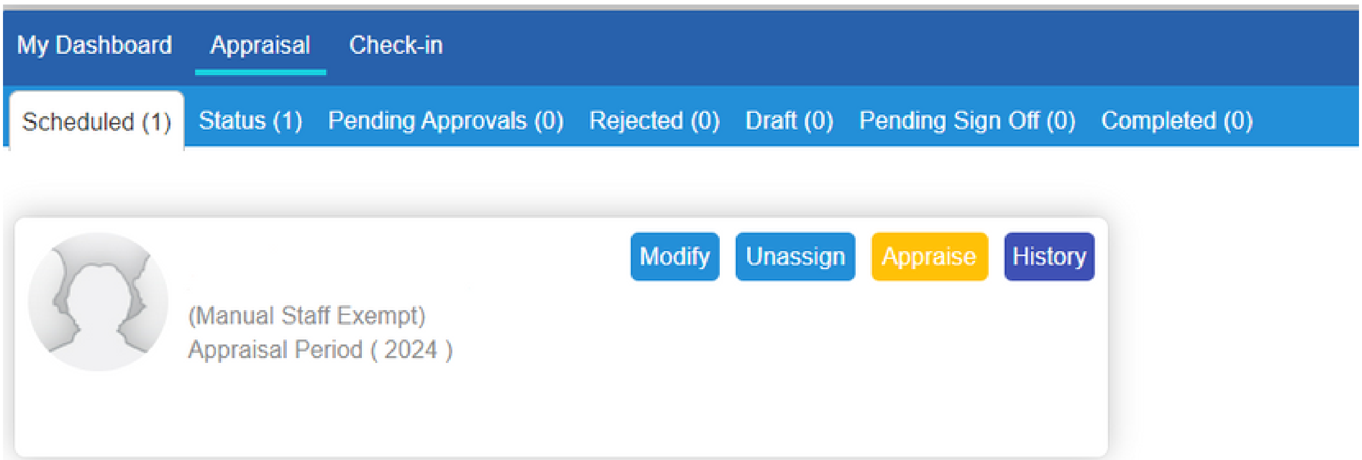
1. To begin the annual process for your direct reports, go to the Self-Service login page where you will be directed to the HR Portal.

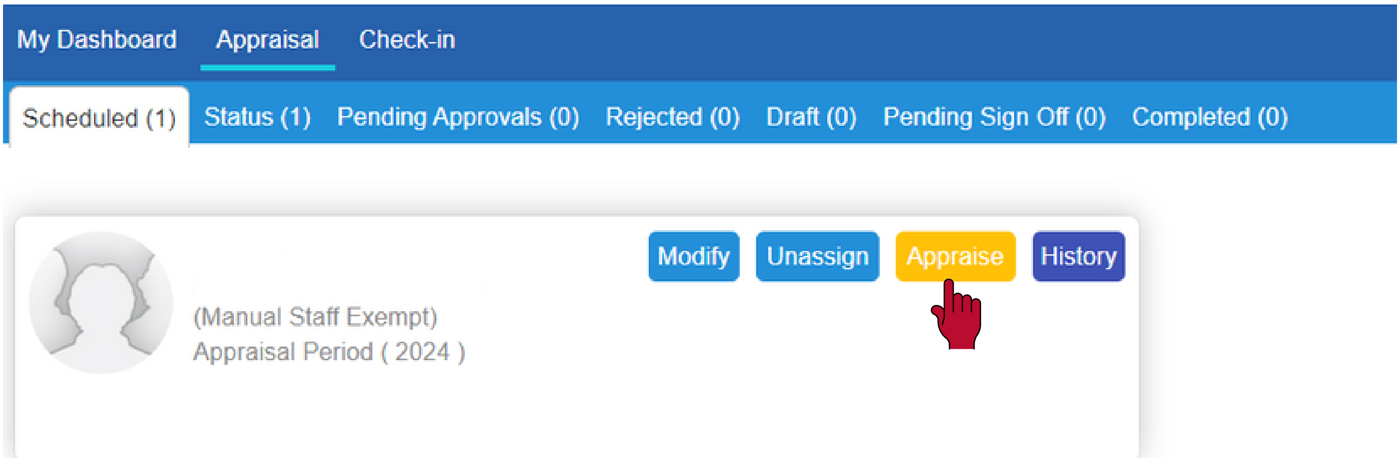


2. Select the **Talent Mgt (incl. Performance)** tile. You will need to log in with your Emory credentials to access the Performance Management site.

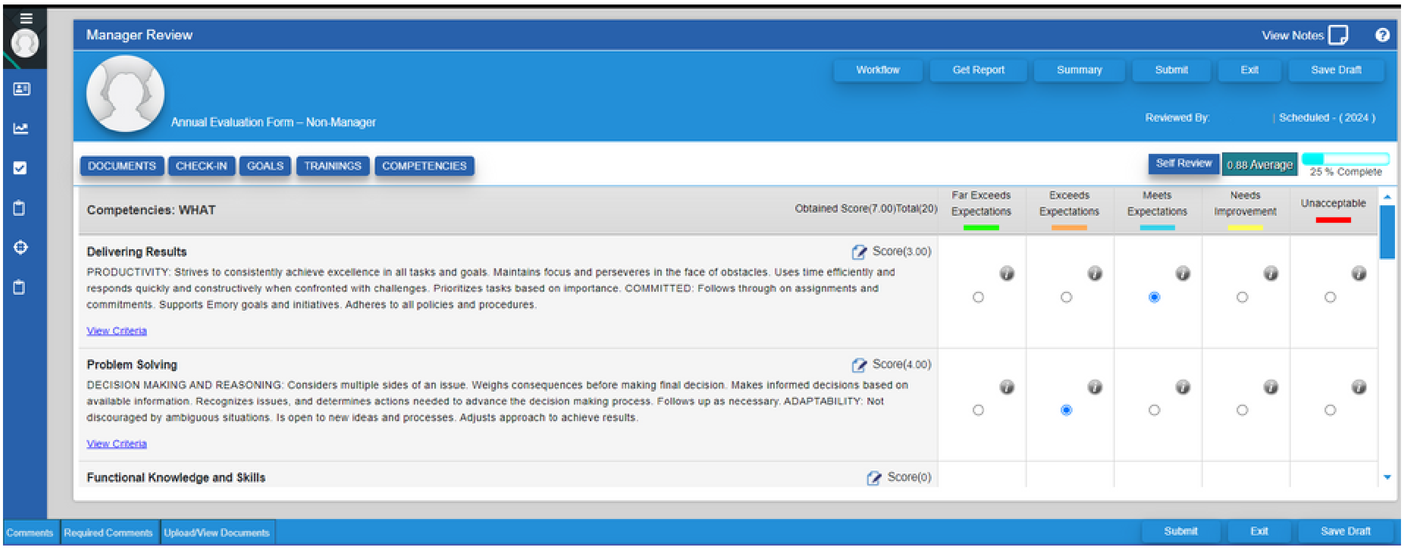
3. Once logged in, navigate to the **appraisal** section to begin the appraisal process.



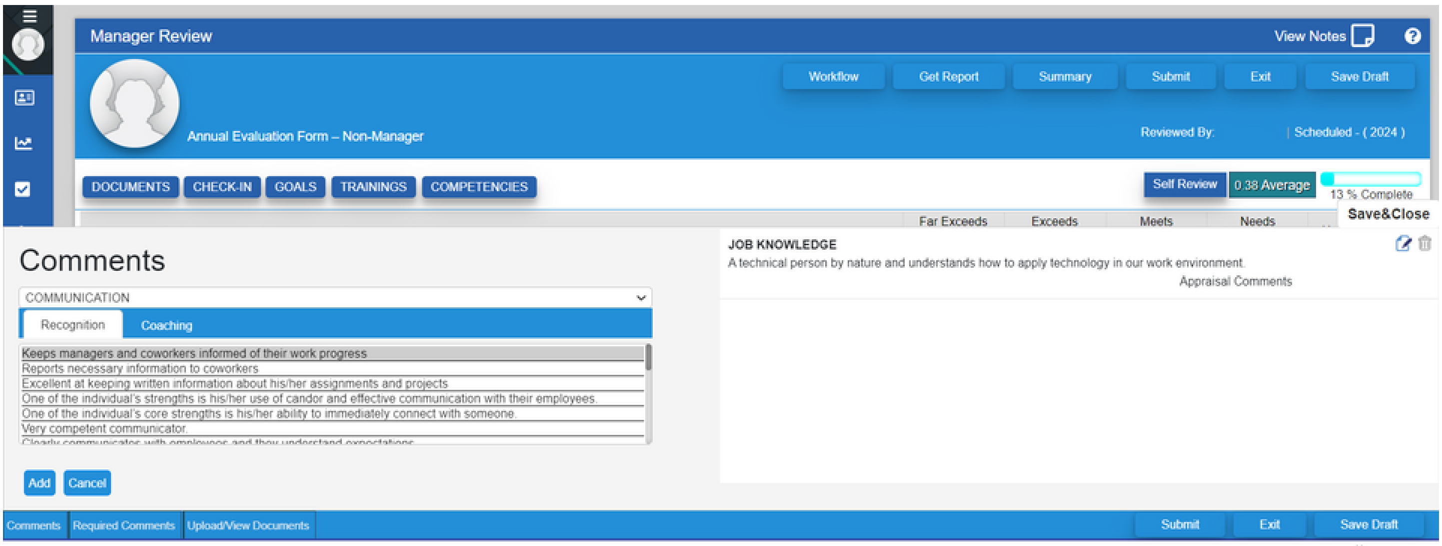
4. Since all appraisals will be scheduled automatically; then, you will have the visibility to view the appraise button. (If there is no appraise button for your employee, reach out to the Talent Management team as we will need to create the appraisal for the employee.) Select *appraise* where you will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



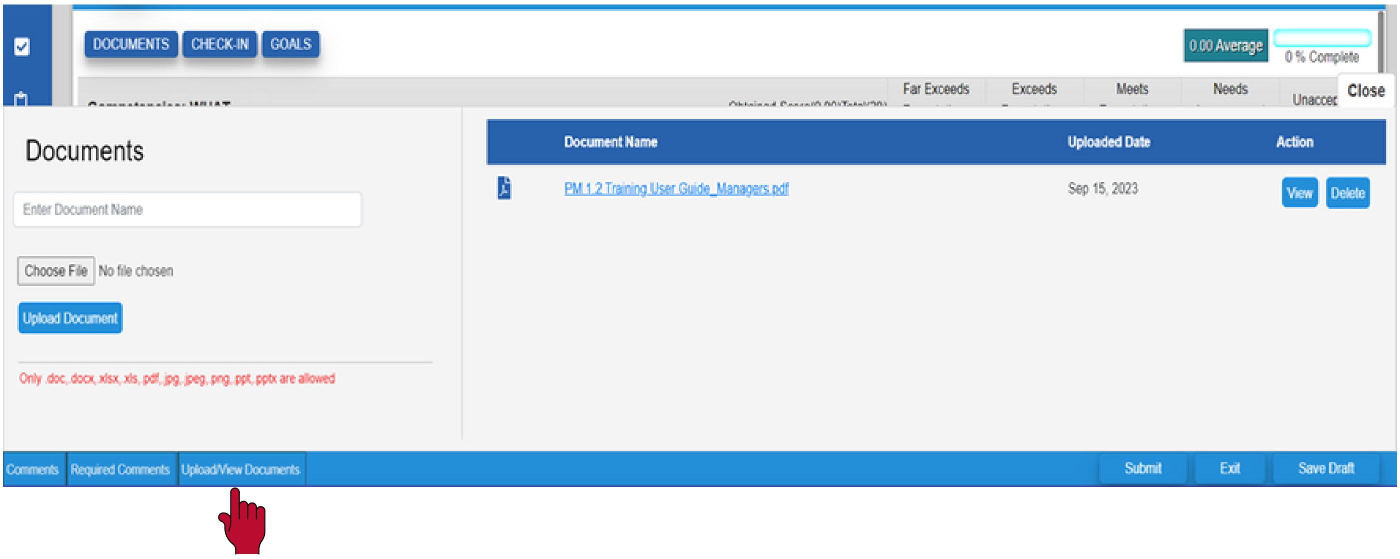
5. As you view the competencies, select which rating best describes your direct report. If you are unsure on how to rate them, select the *view criteria* link where you will be able to read a brief description of the competency along with example behaviors at different levels of performance. Ratings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



6. 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***.

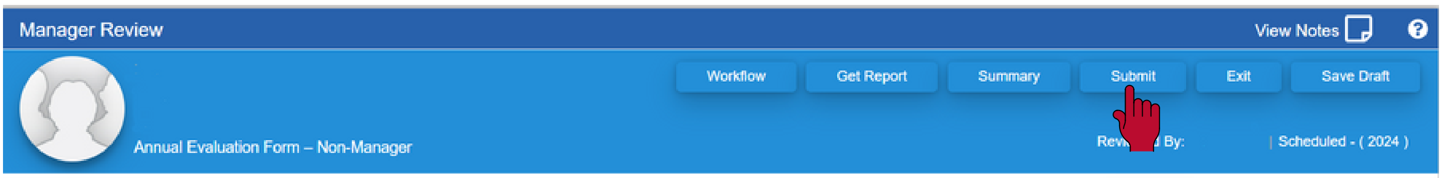


7. On the year end appraisal, documents that have been uploaded to your direct reports profile will be visible at the top of the appraisal form. If you would like to upload additional documents to the appraisal itself, scroll to the bottom of their appraisal and select the *upload/view documents* button. Select ***close*** when you have finished adding your document(s).



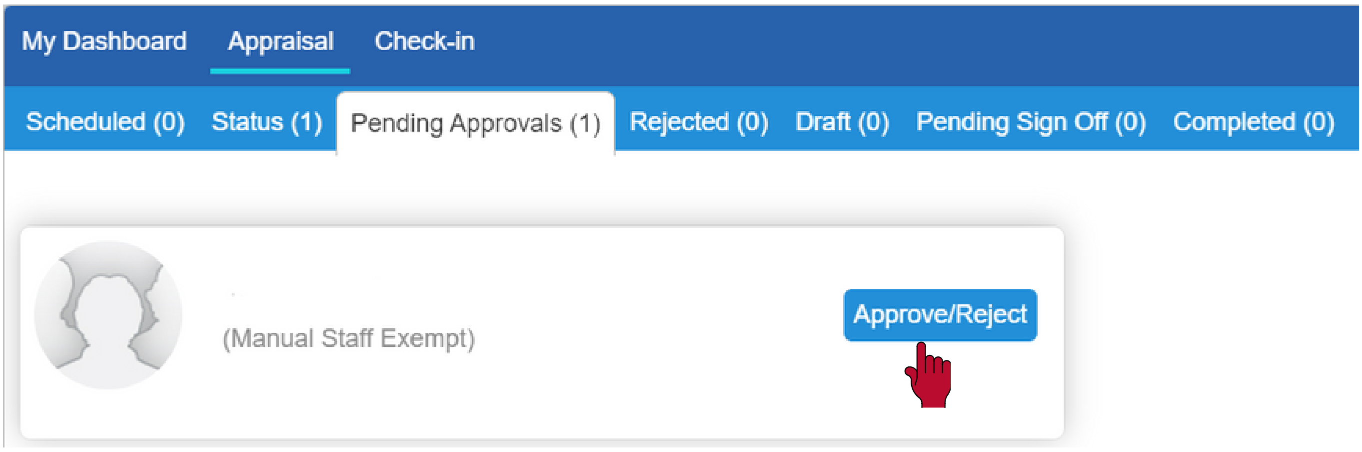
8. The year-end appraisal process cannot be completed until all forms have been submitted or expired: self-evaluation and Upward Feedback (360; if provided/applicable). If the additional forms have not been submitted, or have not yet expired, then you will need to ***save draft*** until ready. Section IV provides more information on the Upward Feedback (360) tool.

9. Once all forms have been submitted; go back to the appraisal section and select appraise on your direct report. 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.

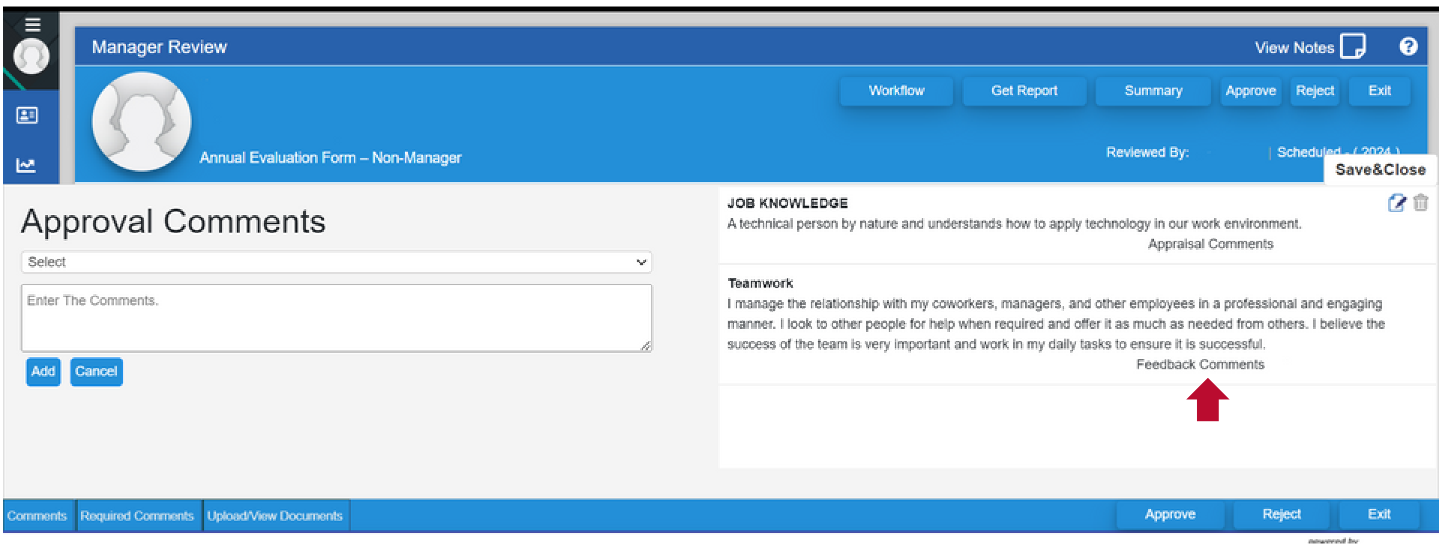


10. Once the appraisal has been submitted, it will go to your direct report where they are able to view your comments, acknowledge their year-end appraisal and add any additional feedback in response to your comments. You will receive an email, and notification, informing you that they have acknowledged their appraisal. ***Reminder***: It is recommend not to submit the appraisal for acknowledgement, and/or response, until you have first had a face-to-face meeting with your direct report.

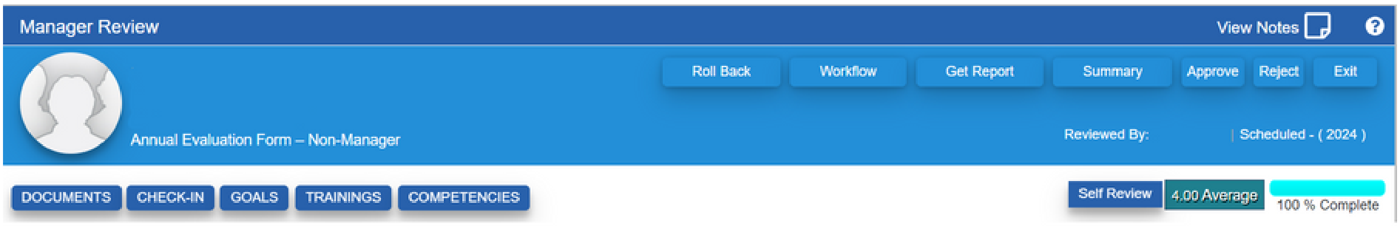
11. On your home dashboard, navigate to **appraisal** and then ***pending approvals***. Select the ***approve/ reject*** button to view any comments provided from your direct report.



12. Go to the bottom of their appraisal and select **comments** to view any feedback from your direct report. Comments provided by your direct report will say *feedback comments*.

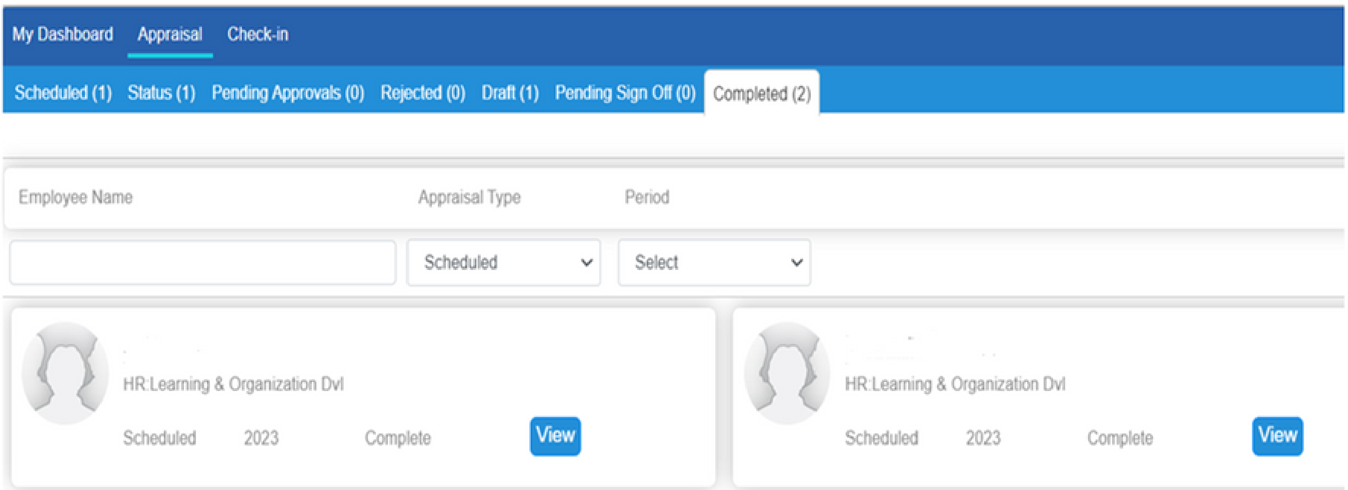


13. If you would like to provide additional comments; then, you will add them as you did in Step 6. If not, select the **approve** or **reject** button. If approved, go to *step 15*. If rejected, go to the *next step*.

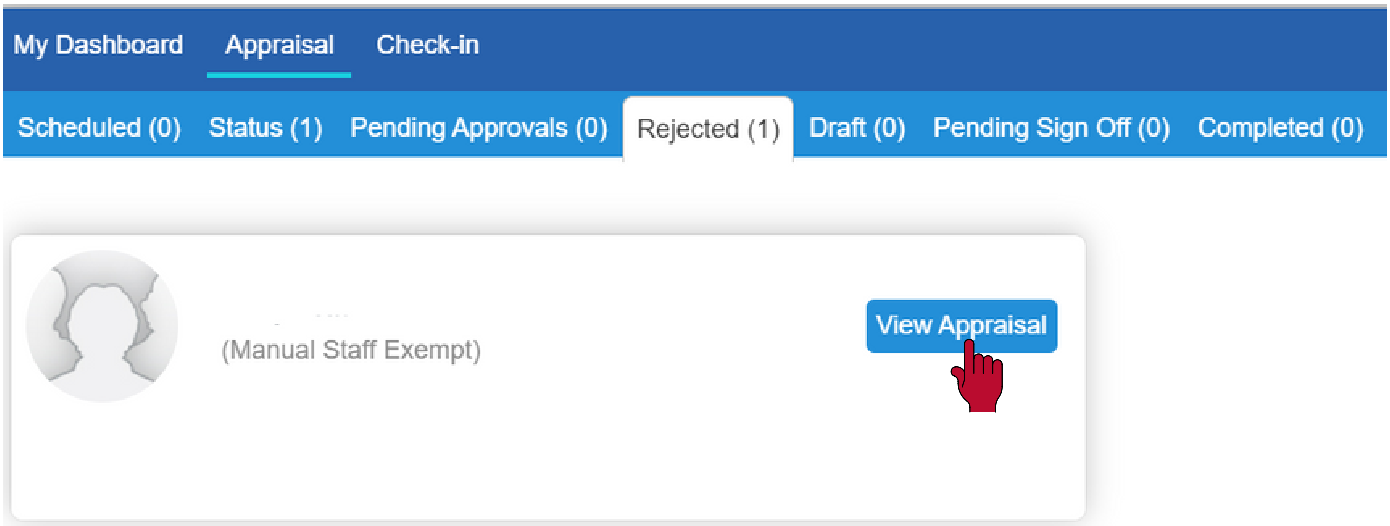


14. Rejecting a form is used sparingly. After your 1 on 1 conversation with your direct report, you may want to change the rating of a competency. You will need to reject a form to add additional comments and make any changes to their appraisal. If you add additional comments during this process, your direct report will not be able to view those rejected comments. Go to ***step 16*** to view steps on the rejection process.

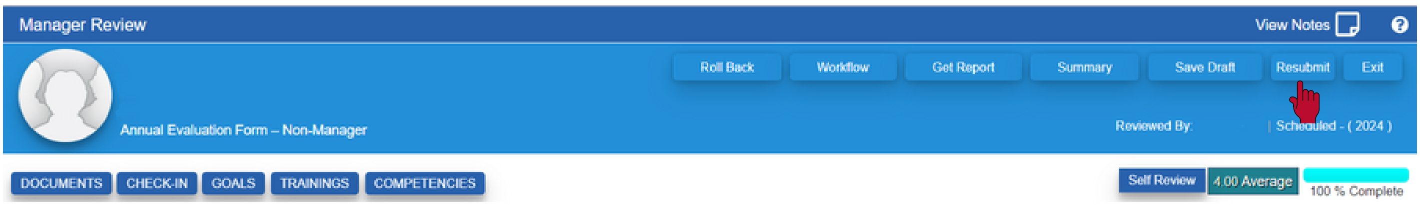
15. Once you approve the appraisal, you can add additional comments if you choose. If not, the appraisal will go to the completed section. The year-end appraisal has now been completed!



16. After you select *reject* go back to your home dashboard. On your home dashboard, navigate to **appraisal** and then ***rejected***. You will be able to view the appraisal(s) that you have rejected; and you will need to select ***view appraisal.***



17. Now you can edit your competencies and add additional comments, if you choose. Once you have made your edits, select the ***resubmit*** button at the top.



18. The appraisal has now been sent back to your direct report to view. The rejected appraisal will be visible in the feedback section for them to access. They will be able to add additional comments if they choose and they will acknowledge their appraisal again.

19. After your direct report has acknowledged their appraisal, the appraisal will be located in the completed section. You can select their appraisal to view any additional comments they may have added after their 2nd acknowledgement.

PERFORMANCE MANAGEMENT USER GUIDE

MANAGER EDITION: REVIEWING UPWARD FEEDBACK (360)

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.
<u>Never give the 360 comments directly verbatim to the person you are evaluating.</u>

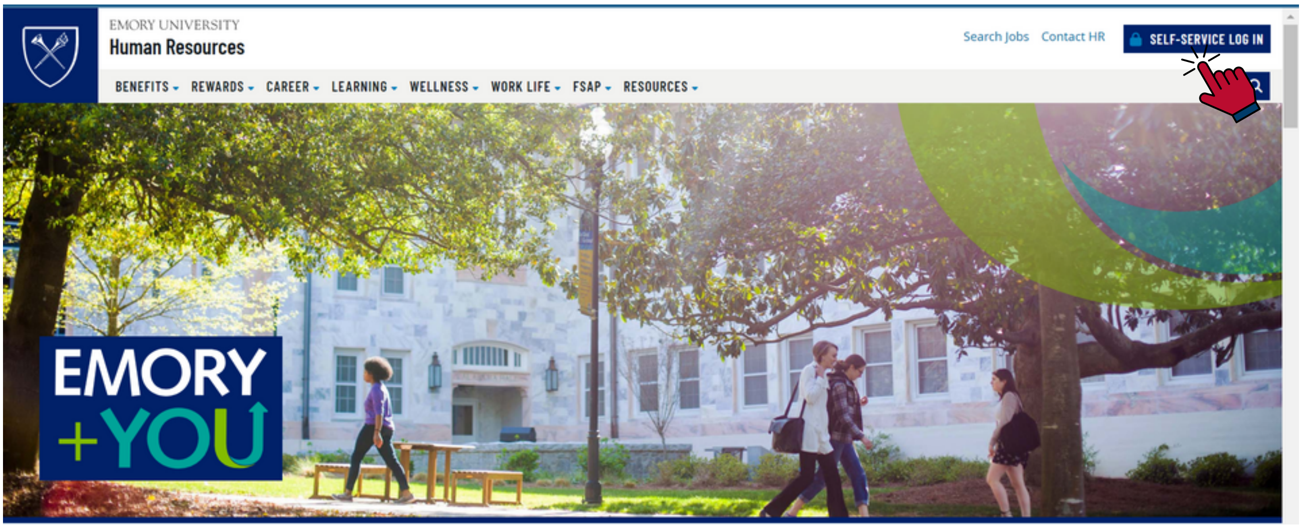
How to write comments: If you are asked to provide comments about your own supervisor, when responding to these questions, it is easy to reflect on only your most recent interactions with your supervisor; but, it is best to think collectively of your supervisor's behavior throughout the year. Reflect 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.

*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.

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

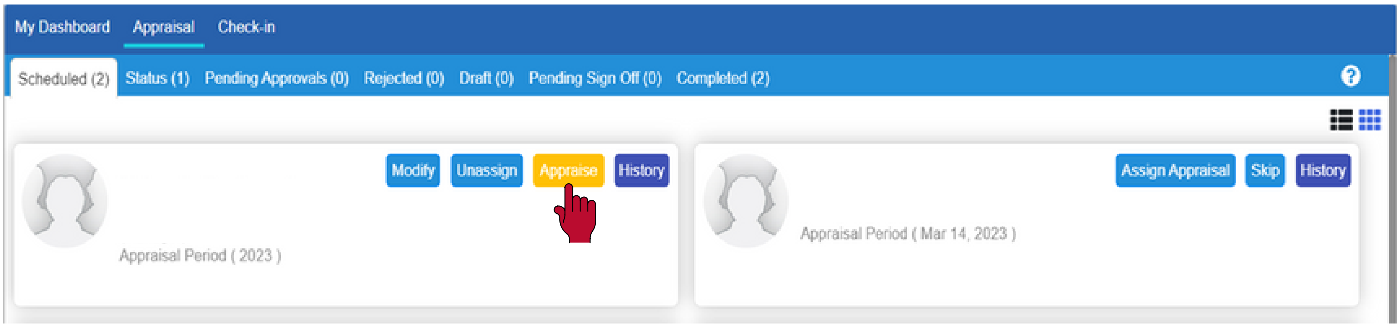
1. When year-end appraisals are scheduled; all managers/ leaders who have two or more direct reports should receive the upward feedback (360) form. If these criteria are met and employees did not receive an upward feedback (360) form; please reach out to the Talent Management Team. As a reminder, all 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. To view the upward feedback (360) provided from your direct report's employee's, go to the Self-Service login page where you will be directed to the HR Portal.

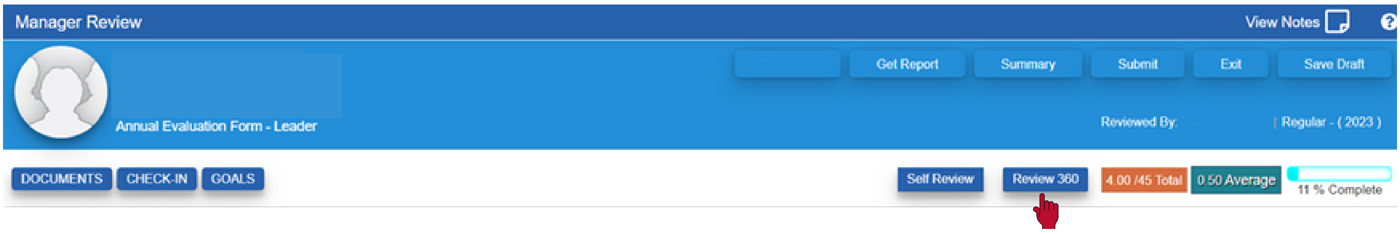


3. Select the **Talent Mgt (incl. Performance)** tile. You will need to log in with your Emory credentials to access the Performance Management site.

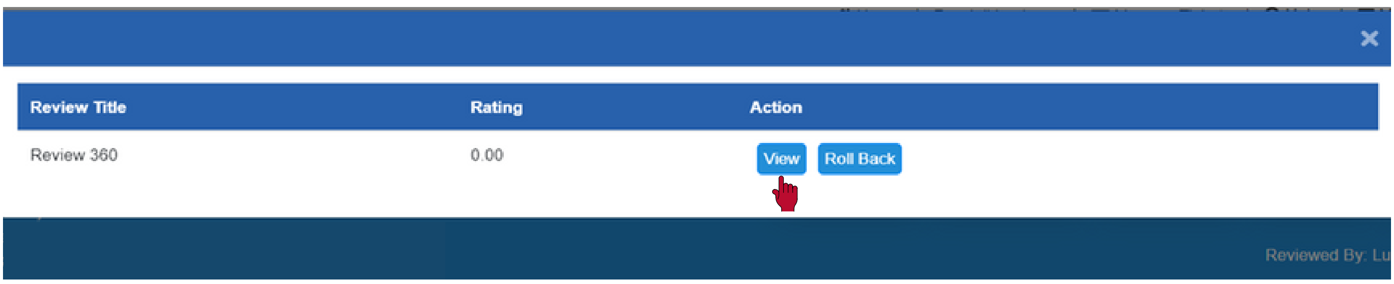
4. After you log in, navigate to the **appraisal** section and select appraise to view the upward feedback (360) form.



5. Only one direct report 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 employee that does not affect their mid-year or year-end evaluations
- Open discussion with no limit until both manager, and direct report, 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 annual process easier
- Takes less time to complete their review
- Providing detailed documentation closer to an event is more accurate

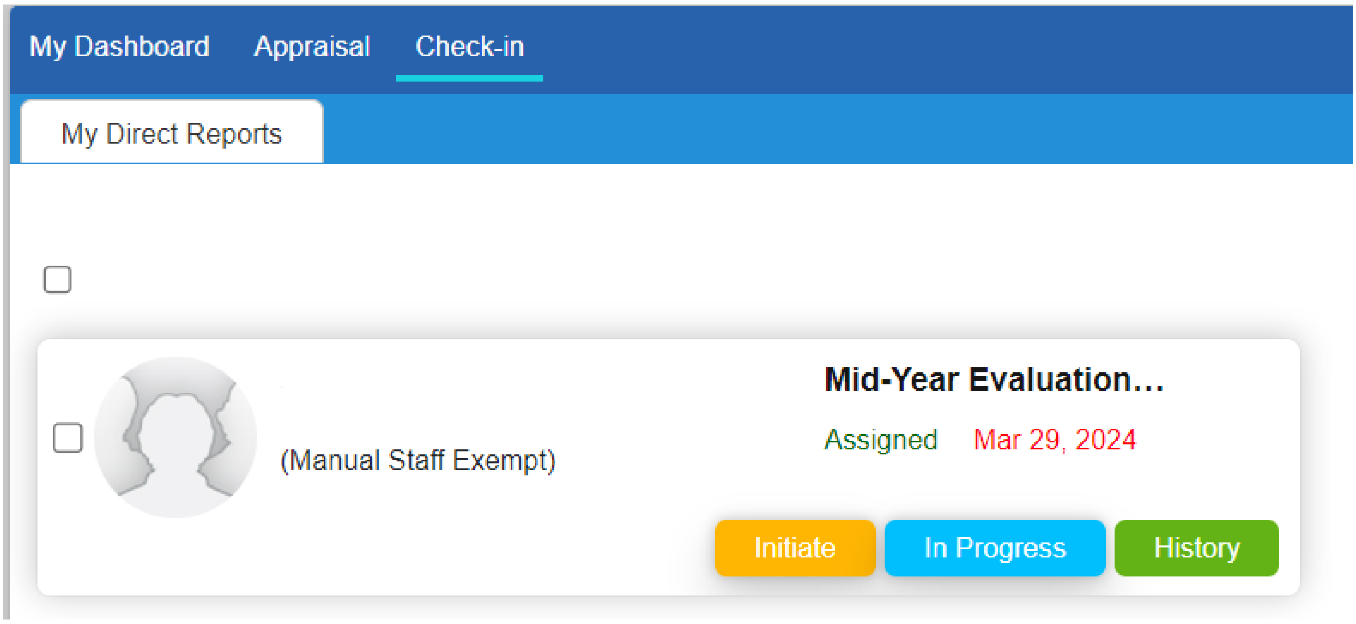
Adding Documents
This section inform you on how to add documents to your direct report(s) profile.

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

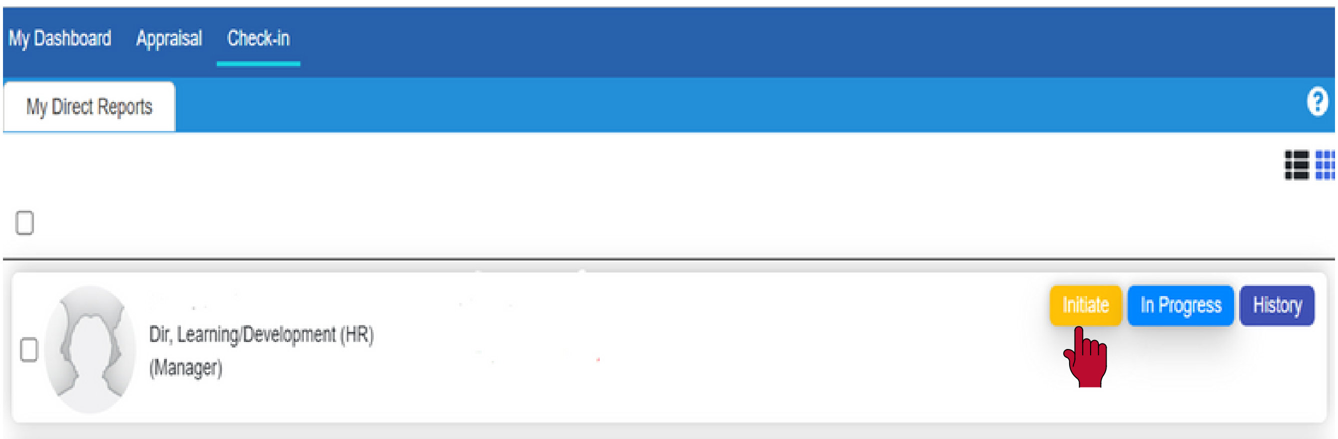
Reports
This section provides information on the different reporting documents to view.

Check In Tool

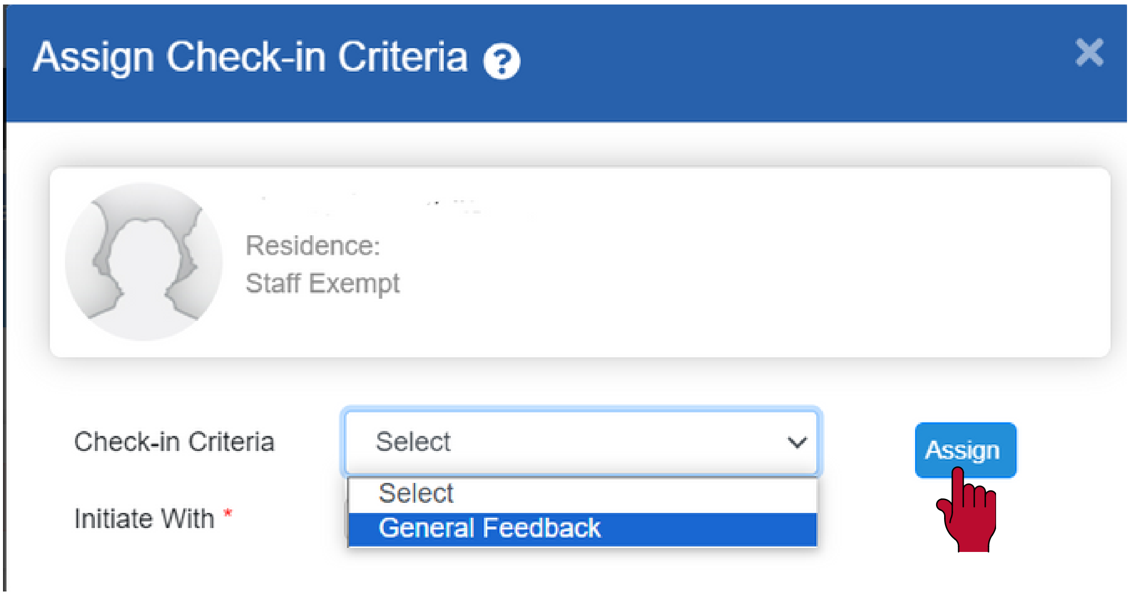
1. If you would like to create a General Feedback Check-In, for your direct report, go to your home dashboard and navigate to the check-in section.



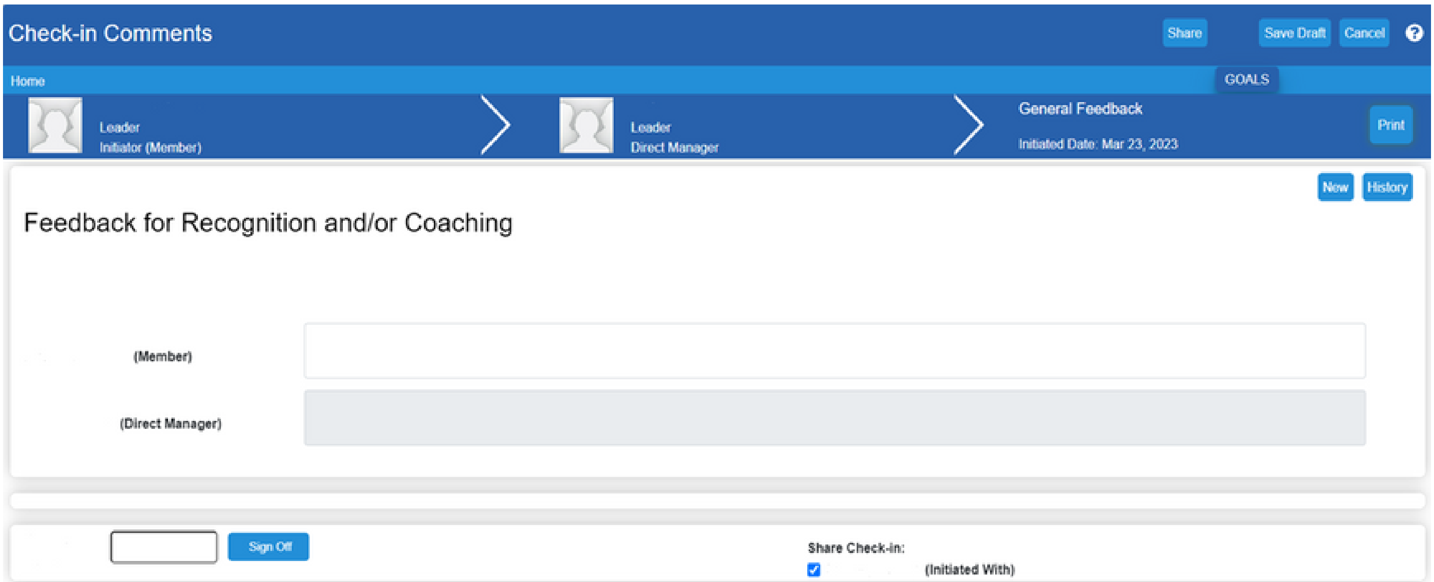
2. Then, select the initiate button.



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 ongoing conversation on any topic you would like to discuss. You can continue to keep this form open until you are ready to end the discussion.

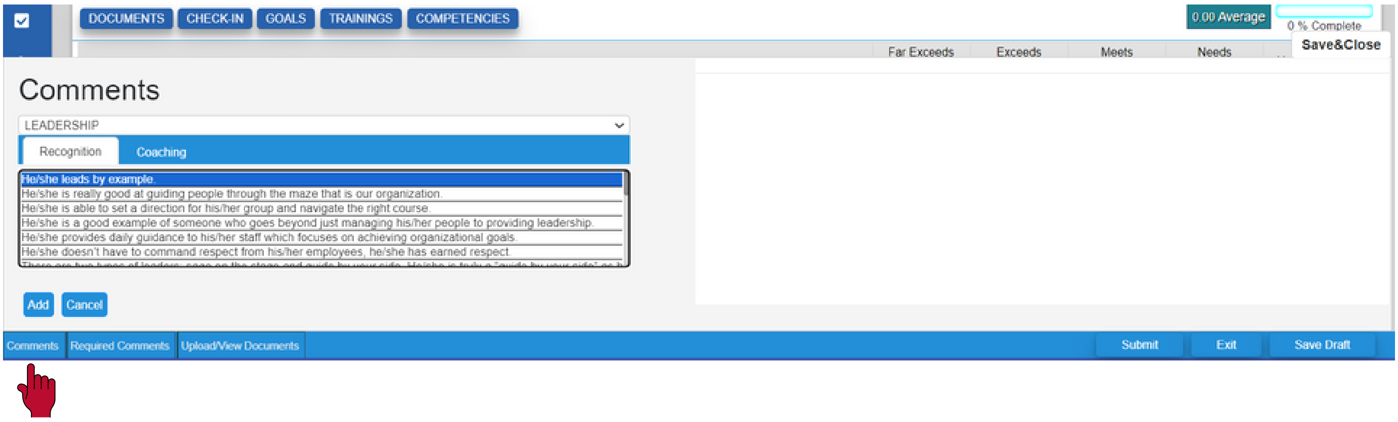


4. This form is similar to the mid-year form; however, there is no overall score. When you are ready to share your comments with your employee, select the ***share*** button at the top. If you are not ready to share, uncheck the share check button (at the bottom of the screen) and select the ***save draft*** button. The form will not be submitted until you are ready to share. ***Sign off*** on the form when the discussion has concluded.

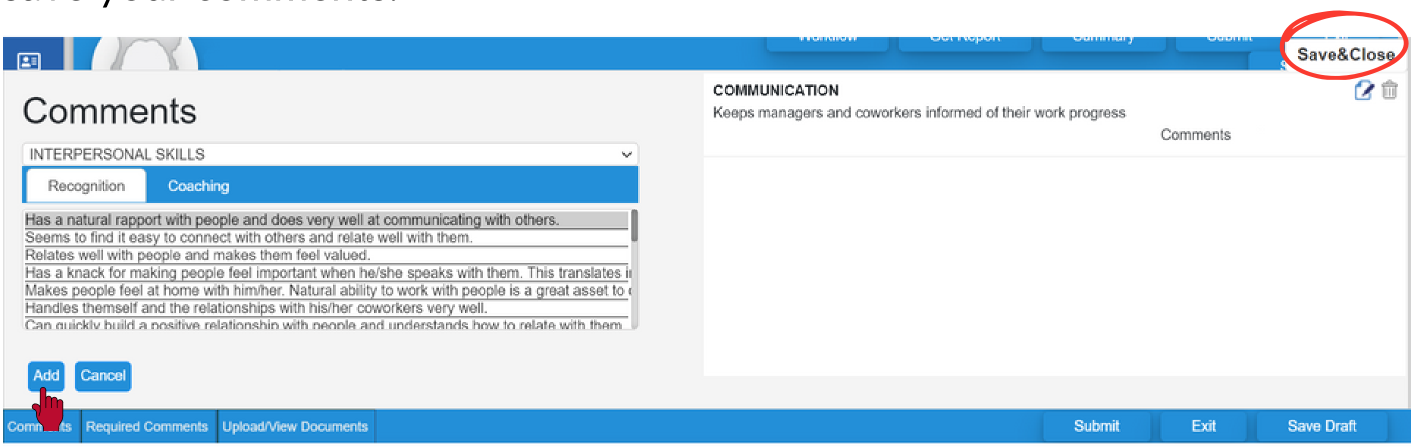


Comment Writer Tool:

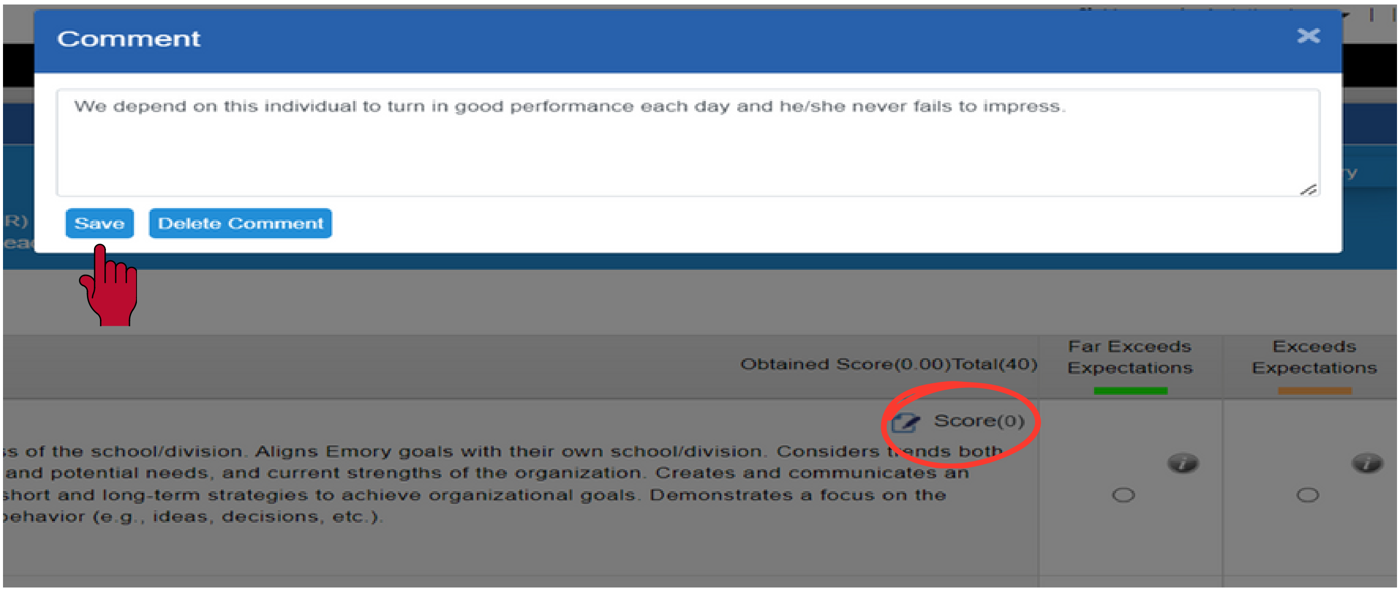
1. The comment writer is only visible in the year-end evaluation forms (self and year-end appraisal). If you would like to use the comment writer, go to the bottom of the year-end evaluation, select *comments* and choose the category you would like to select a comment from. Or, select general comments to provide your own personal comment.



2. 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.

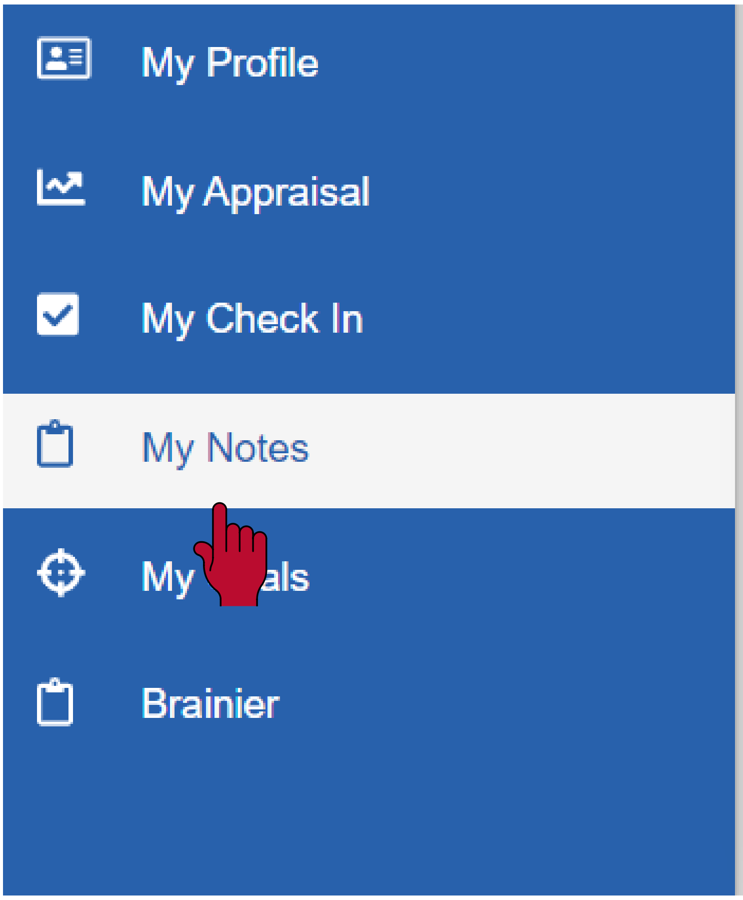


3. After you copied the comment from the Comment Writer tool, select the pen and paper icon that is in the competencies. Paste the comment and ***save***.

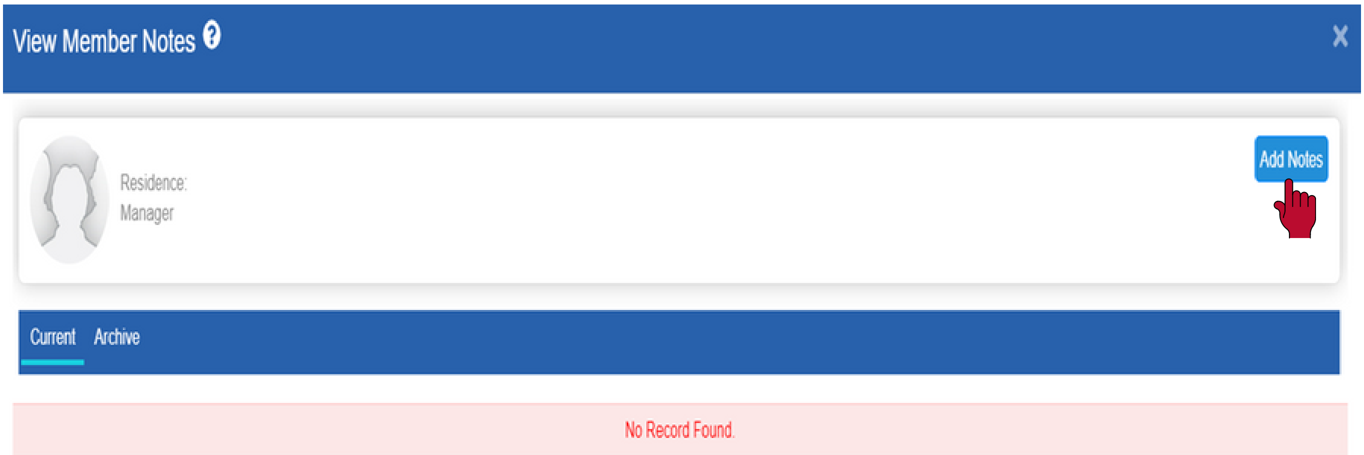


Notes Tool:

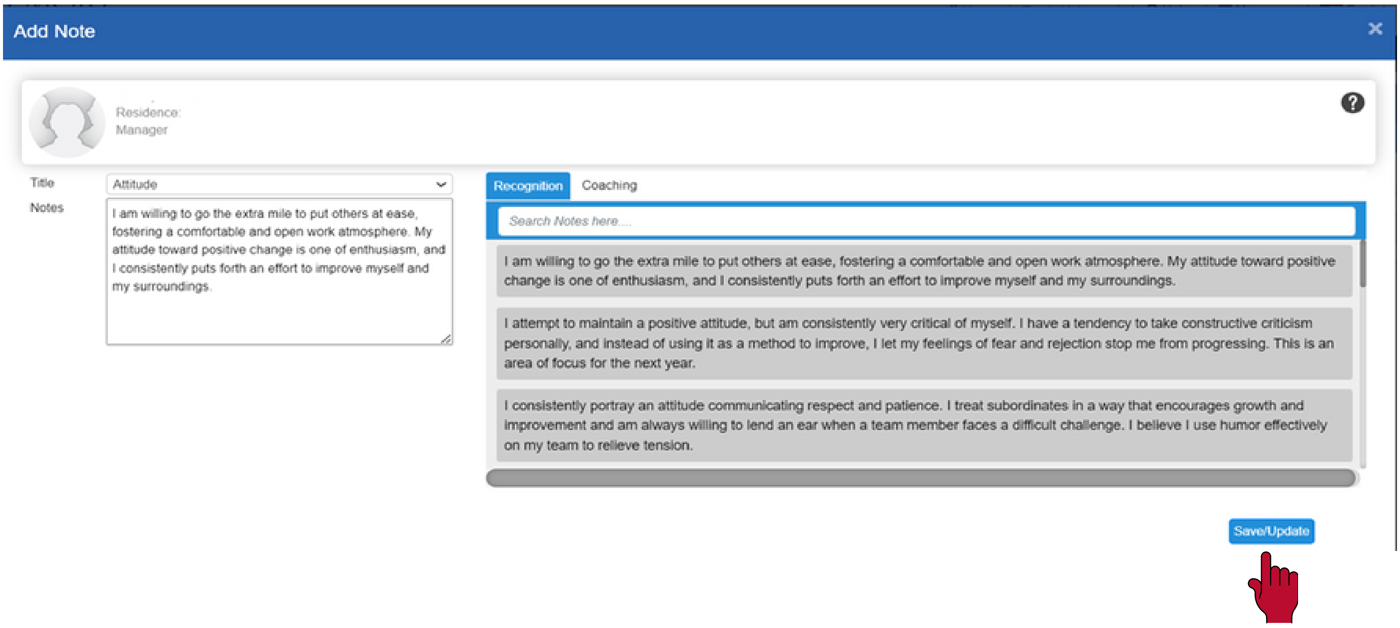
1. To create your own personal notes, go to your home dashboard and select **My Notes**.



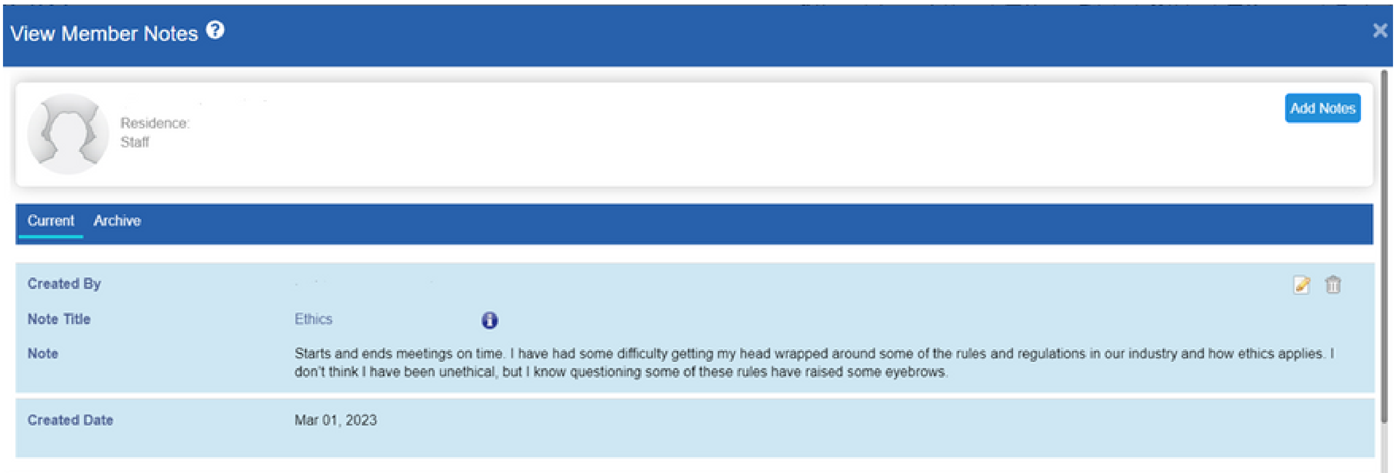
2. From here, select ***add notes***.



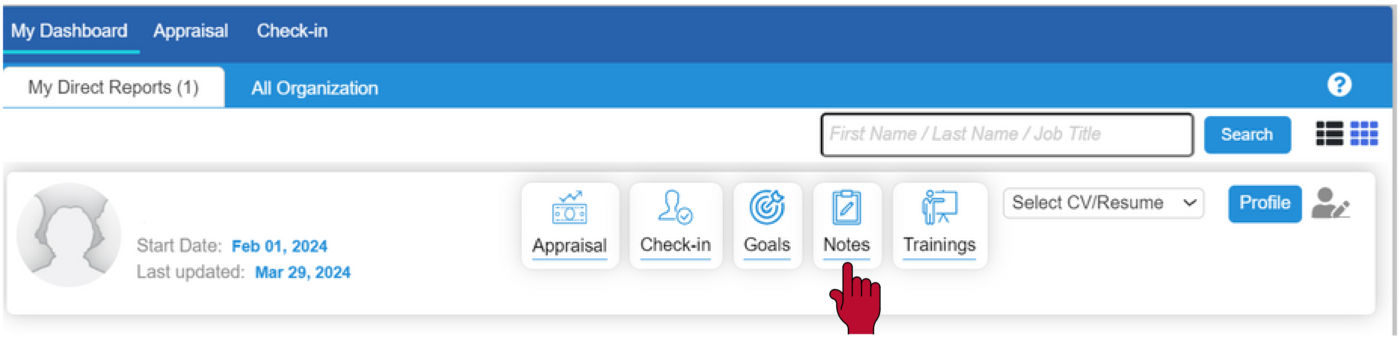
3. Under the title dropdown, there will be multiple categories to choose (same as Comment Writer Tool) to help you create your own notes. Select the prepopulated note you like, or create your own note, and select ***save/update***.



4. Your note will now be visible under your notes on your dashboard. The notes you create are not visible to anyone but you.

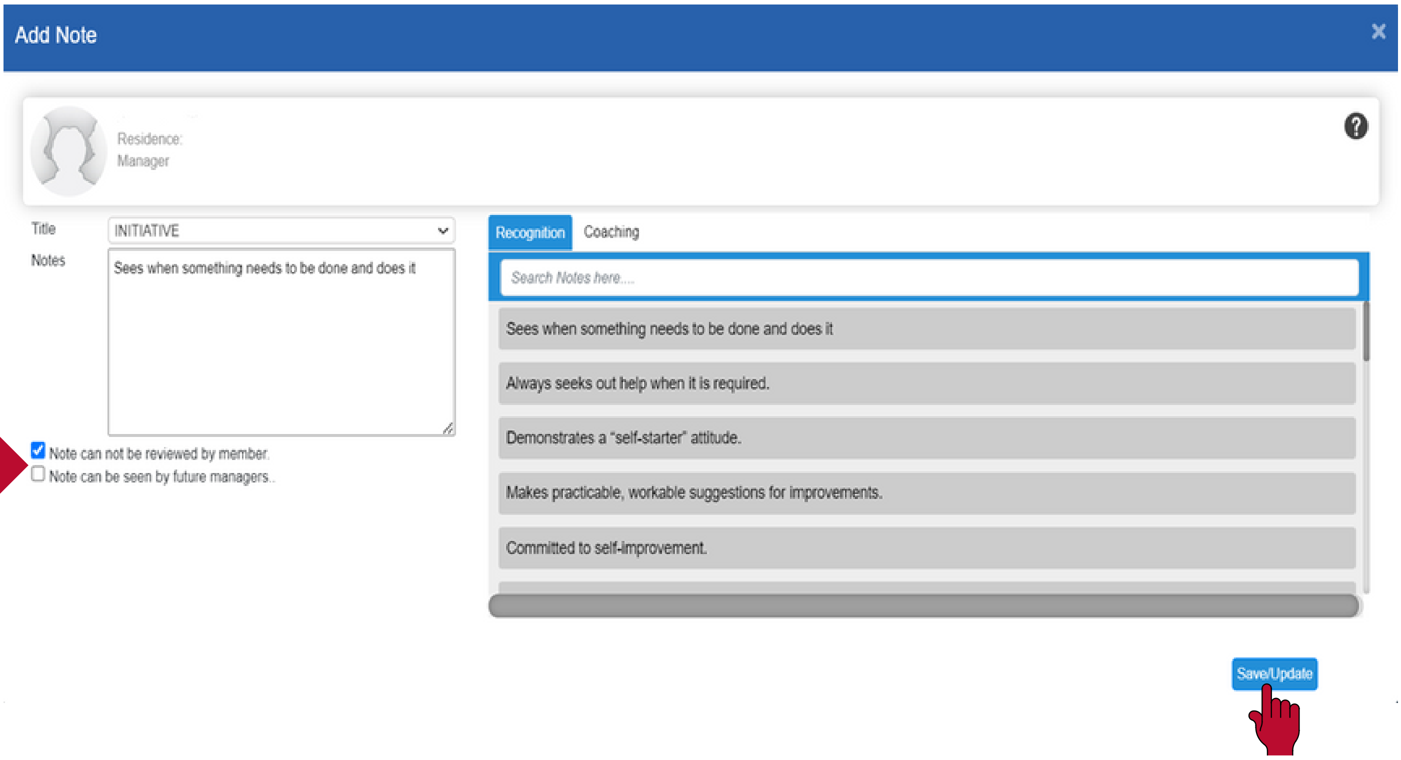


5. To create a note for/about your direct report, go to your dashboard and select **notes** on their employee row.

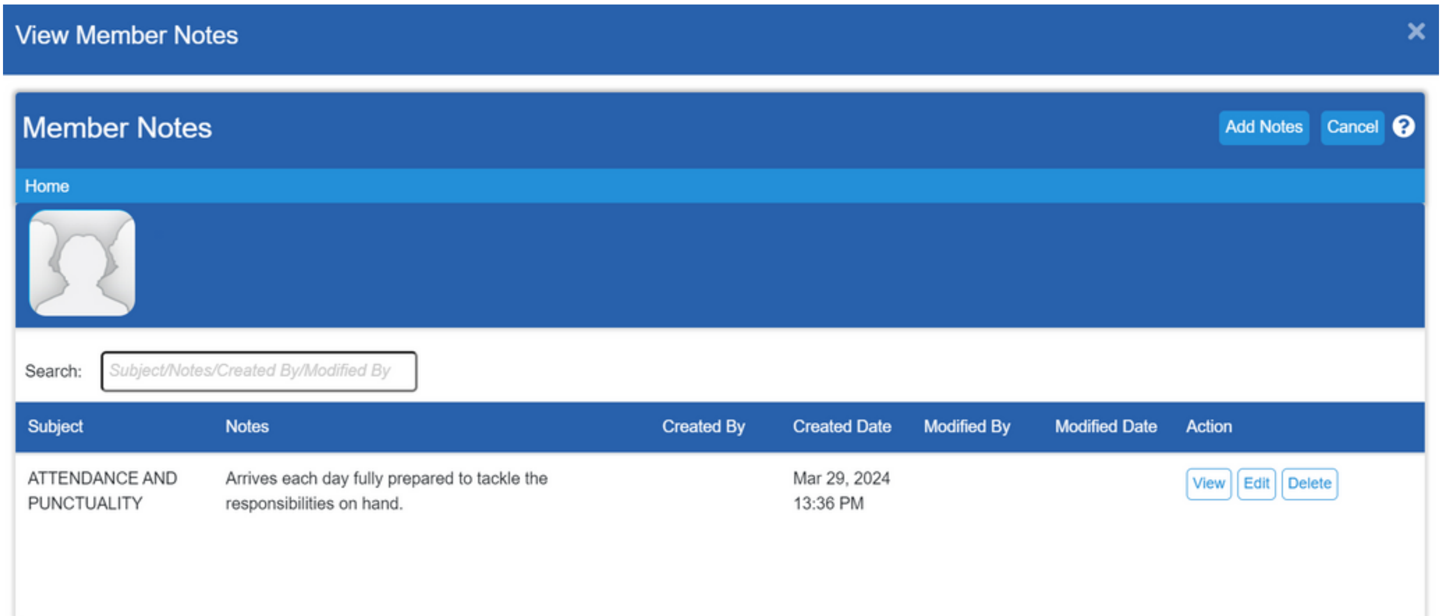


6. Select the ***add notes*** button where you will be able to type your own notes and view all the pre-written text from the Comment Writer tool.

7. 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 direct report 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.

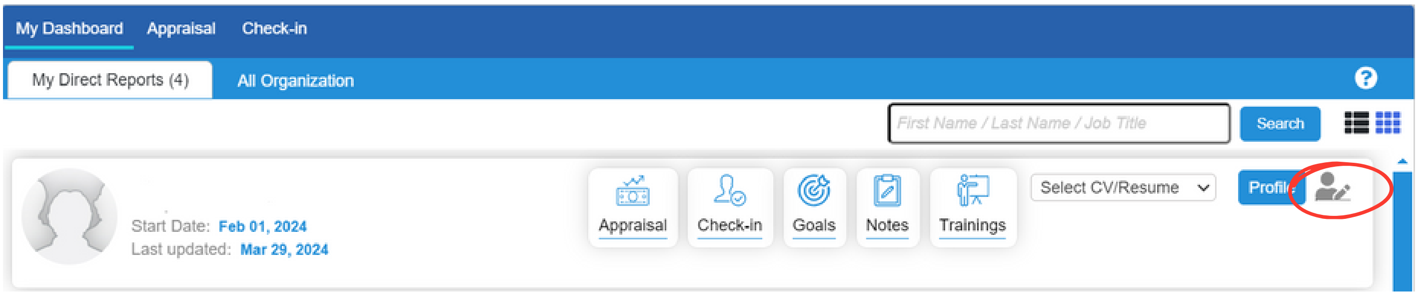


8. To view the notes you have created, go back to your dashboard and select the **notes** on the employee's row. The notes that you have created will now be visible.

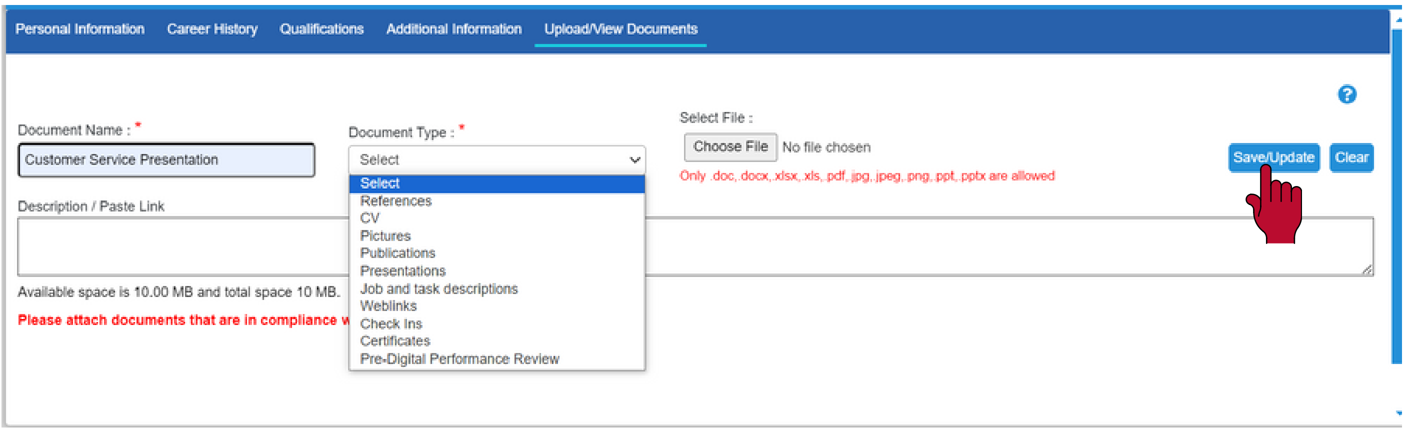


Adding Documents:

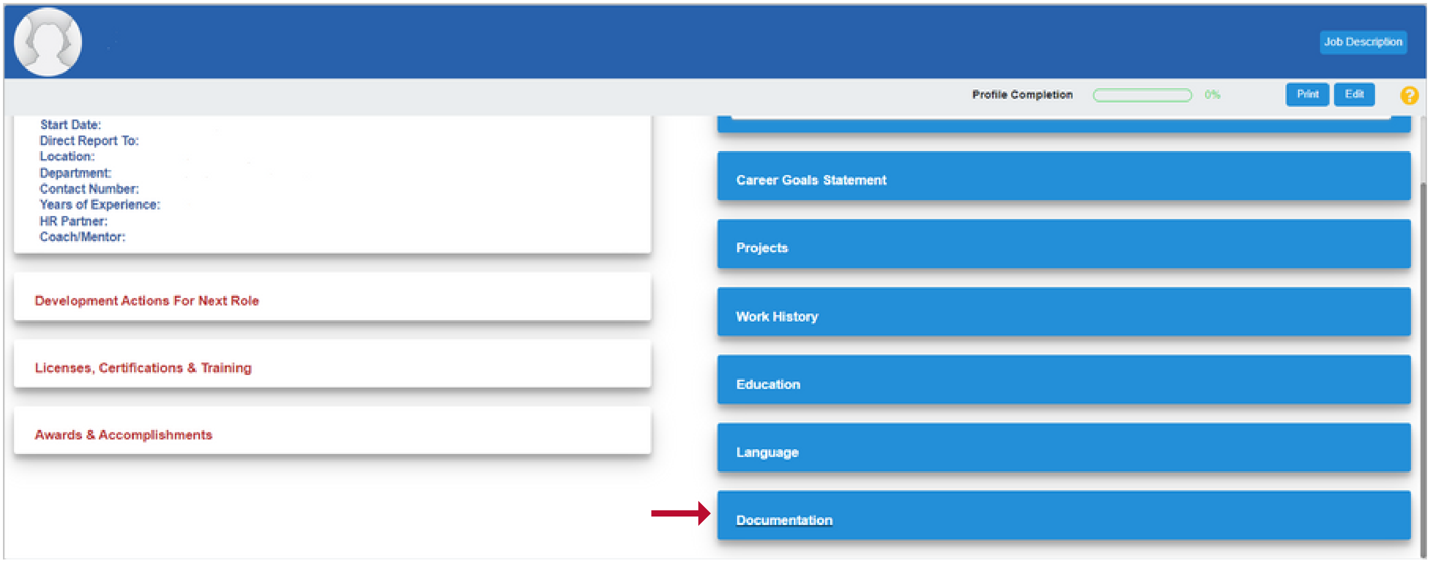
1. To add documents to your employee(s) profile, select the **person icon** on their employee row.



2. Navigate to the ***upload/view documents*** tab to upload their documents. Provide a document name, choose a document type and select your file. If you would like, you can provide a description for the document. Select ***save/ update.***

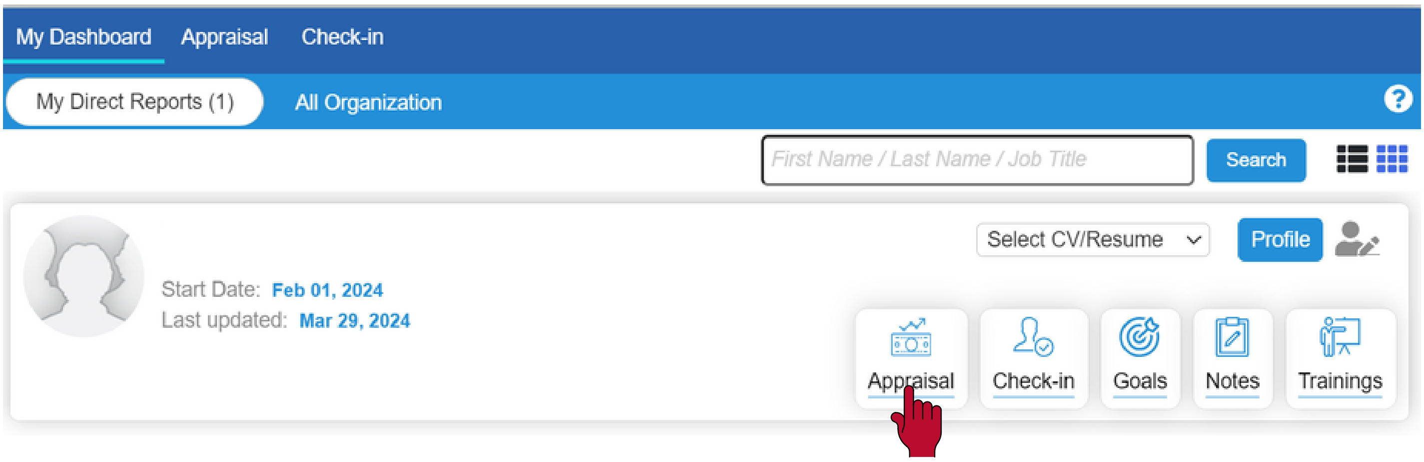


3. Now on their profile the documentation link will be visible for them, you as their direct and manager level ups. Peers are not able to view their profile.

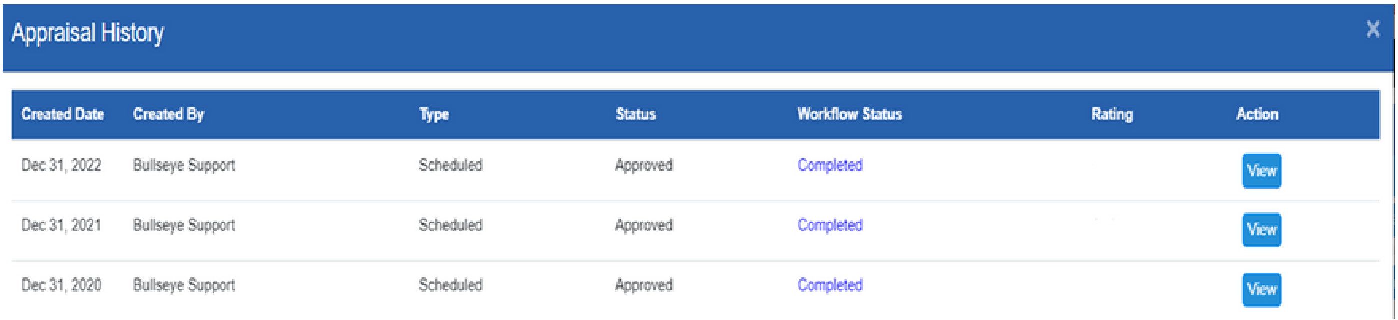


Historical Documents:

1. If you would like to view your direct report(s) previous evaluation(s), on your dashboard select **Appraisal** on their employee row.



2. 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.


Appraisal History

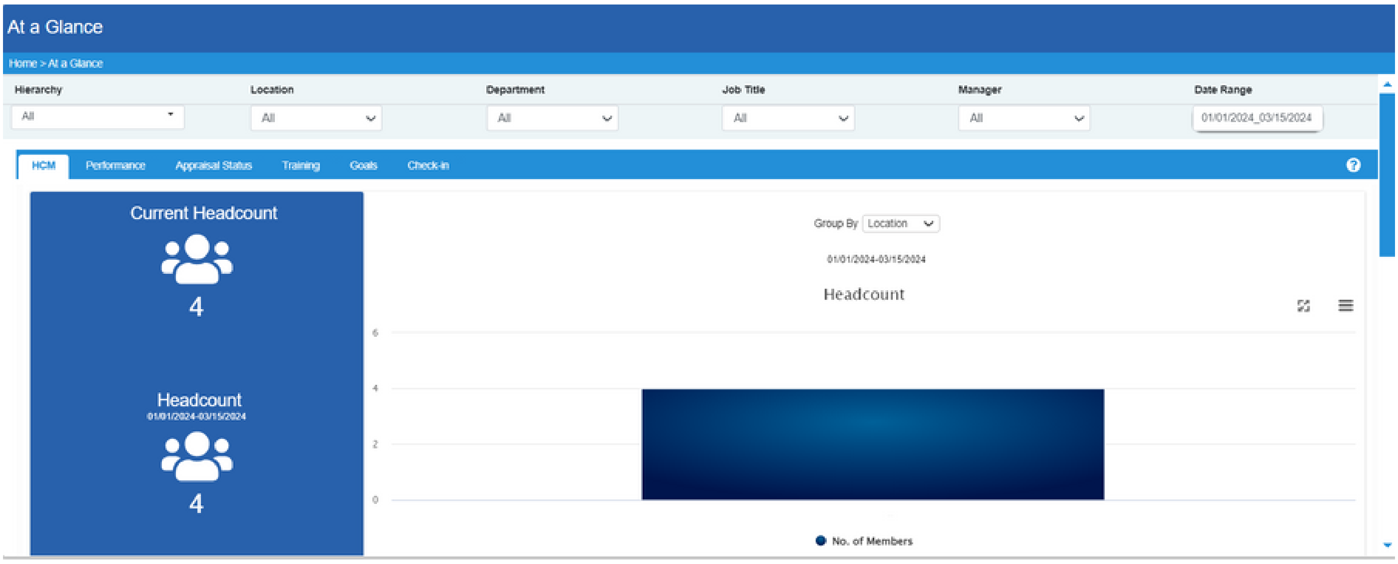
Created Date	Created By	Type	Status	Workflow Status	Rating	Action
Dec 31, 2022	Bullseye Support	Scheduled	Approved	Completed		View
Dec 31, 2021	Bullseye Support	Scheduled	Approved	Completed		View
Dec 31, 2020	Bullseye Support	Scheduled	Approved	Completed		View

Reports

1. To pull a report, go to the reports drop down and select a report you would like to view.

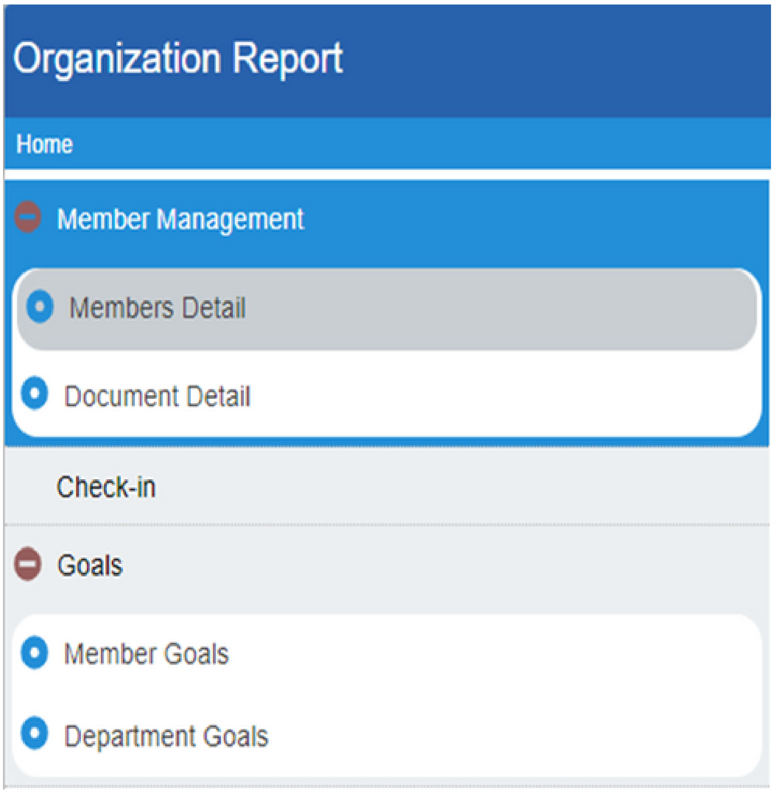
At a Glance

Provides a visual of your department's performance status, appraisal status, goals and check ins.



Organization Report

Provides you a report on goals created from members in your department, check-in status, trainings from Brainier and another way to view your department member's profile.



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 comments that have been added in the check-in.

Check-In Overall Summary: Allows you to view the mid-year status and overall score (if completed). Other check-ins created will be visible here too.

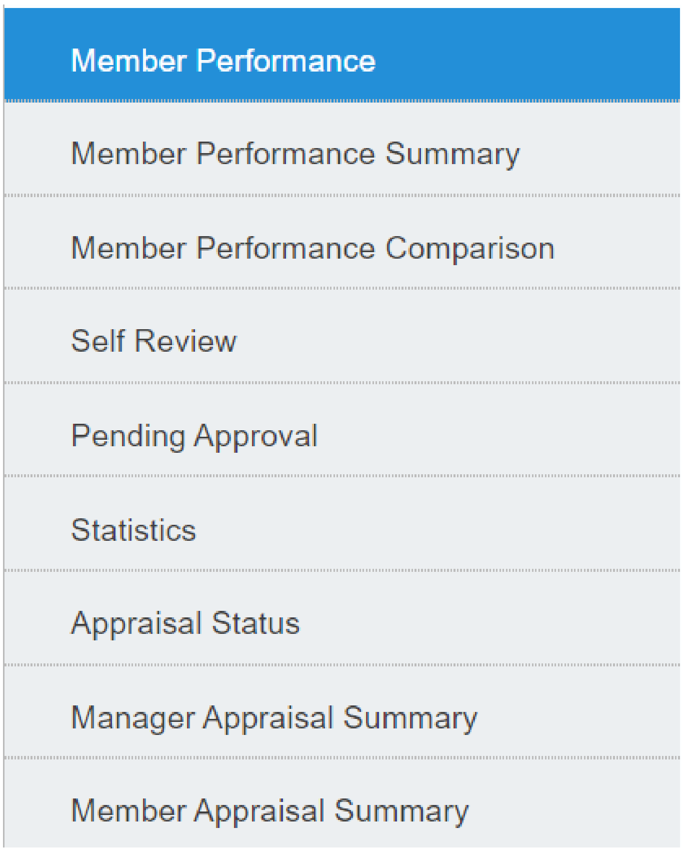
Trainings: Allows you to view the status of trainings from Brainier for your employee's.

Goals

- *Member Goals:* Allows you to pull a goals report for all of your employee's. This report allows you to view the goal name and progress status of the goal.

2. ***Appraisal Reports***

The most common report you will want to use to view the appraisal status of your employees.



Member Performance/Summary: Allows you to view completed appraisals for your employees within one document.

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.

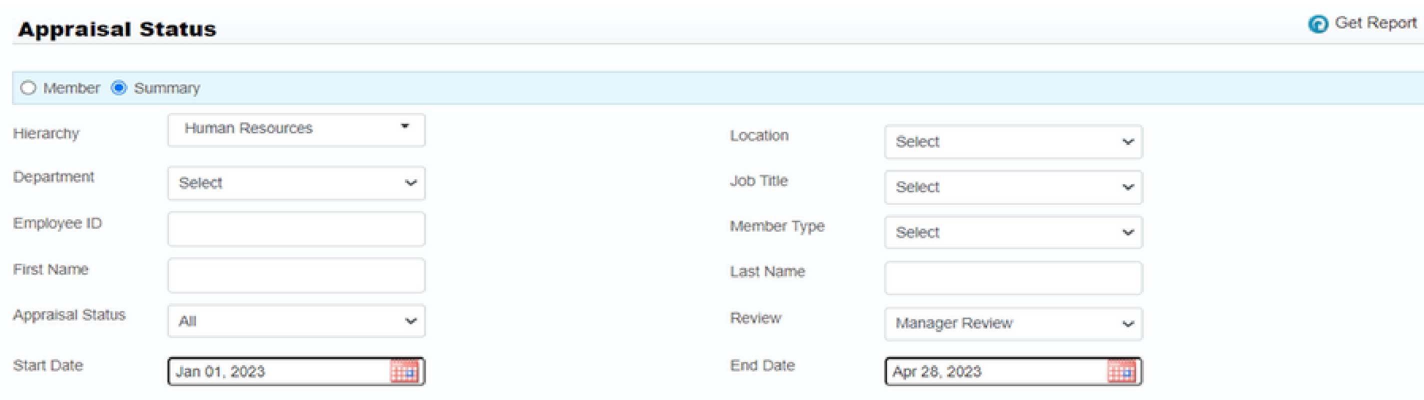
Statistics: Provides a visual report on the employee you selected.

Appraisal Status: Detailed report, including historical reviews, on your employee’s.

Manager Appraisal Summary: Detailed report that provides comments on all competencies on the annual appraisal. This report allows you to view the overall score.

Member Appraisal Summary: Detailed report that provides comments on all competencies on your direct reports self-evaluation.

3. 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.



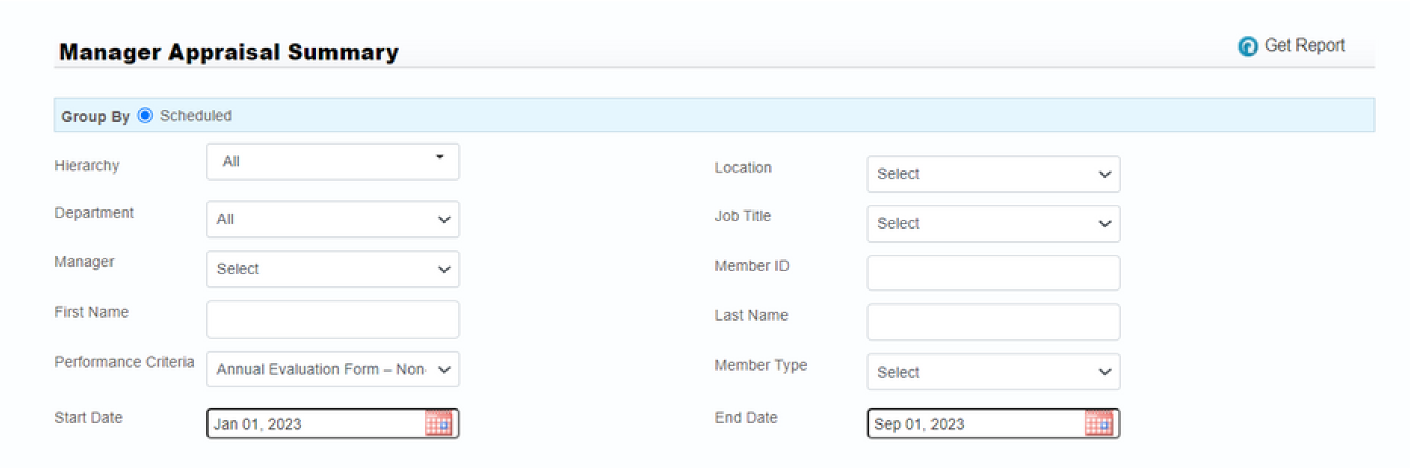
4. A detailed summary will be visible providing the name, department, manager name, assigned appraisal date, status update for: manager review, self review, 360 review. If an appraisal score has been added; then, this will be visible. You can also view the approval workflow status or the pending member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

5. If you would like to view the appraisal document for your direct report, select the hyperlink under the appraisal date.

6. ***Manager Appraisal Summary***

The other most common report you will want to use as it displays the comments within the appraisal. This summary also provides the overall score.

7. Select the *manager appraisal summary*. Change the performance criteria to the annual evaluation form (either: non-manager, manager, or leader), and select the start and end date. Once completed, select the **get report** button.

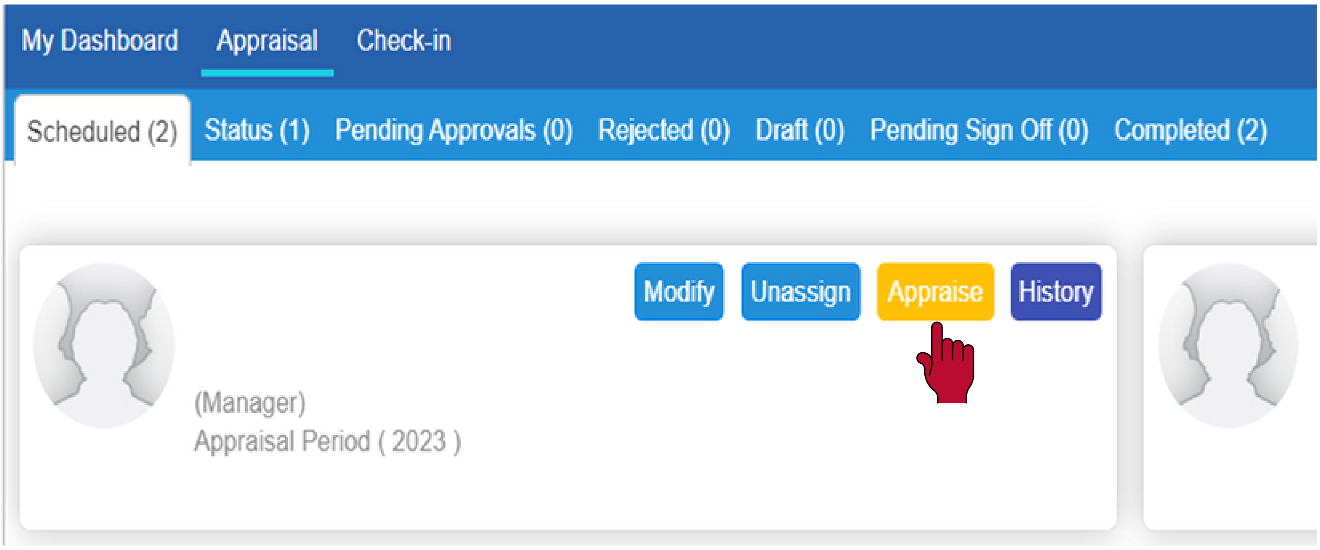


8. A detailed summary will be visible providing the employee's name, job role, competency name and comments within the competency, overall comments, overall status, average rating, manager name, and other additional information. If an appraisal score has been added; then, it will be visible. You are also able to view the overall score. You can also view if the employee has acknowledged their form, or if it has expired, along with the acknowledged date.

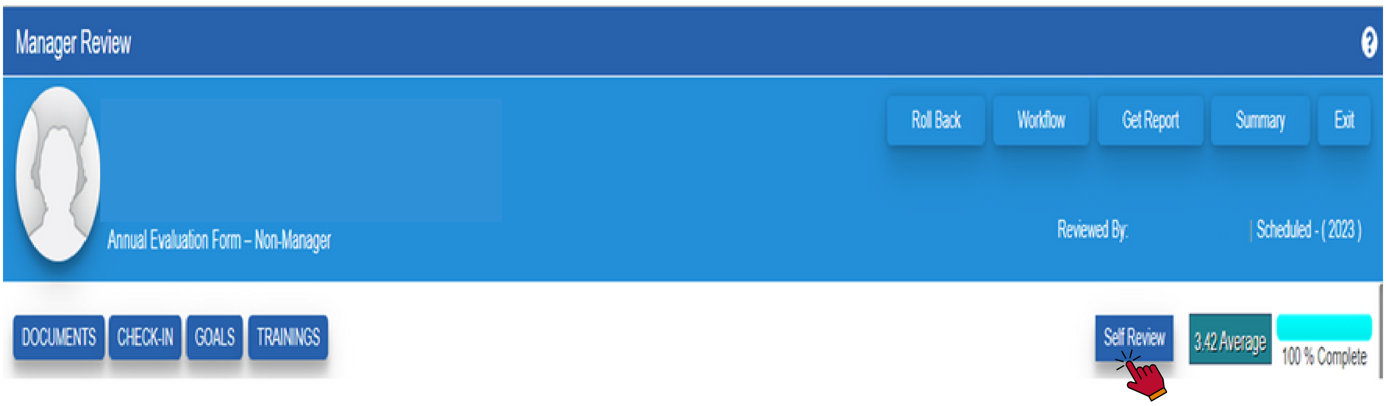
9. ***Roll Back An Appraisal***

Rolling back an appraisal is accessible in the self-review and the manager appraisal view. All admins, and managers, have access to roll back a form for their direct reports

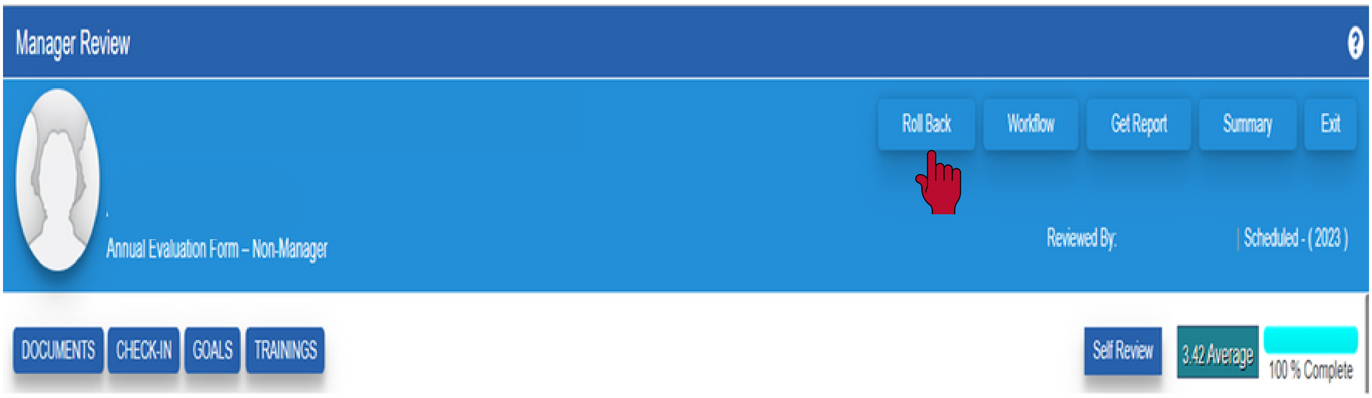
10. On your home screen, scroll to the top and select ***appraisal*** and appraise on the employee.



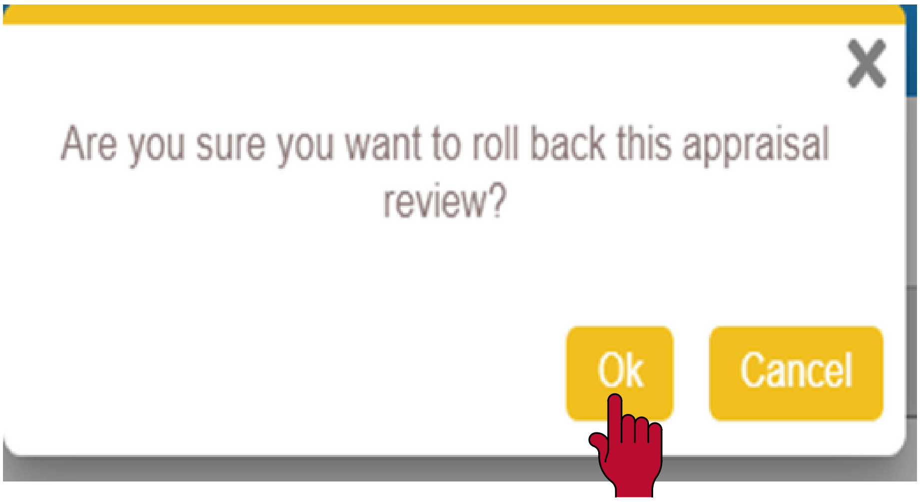
11. Once you select appraise, you will now be able to view your direct reports appraisal. If their self-review has been submitted to you, and they need to make changes, select the self-review button.



12. At the top of their self-review you should see a **roll back** button. If you select the roll back button, a pop up will appear confirming you want to roll back their form.

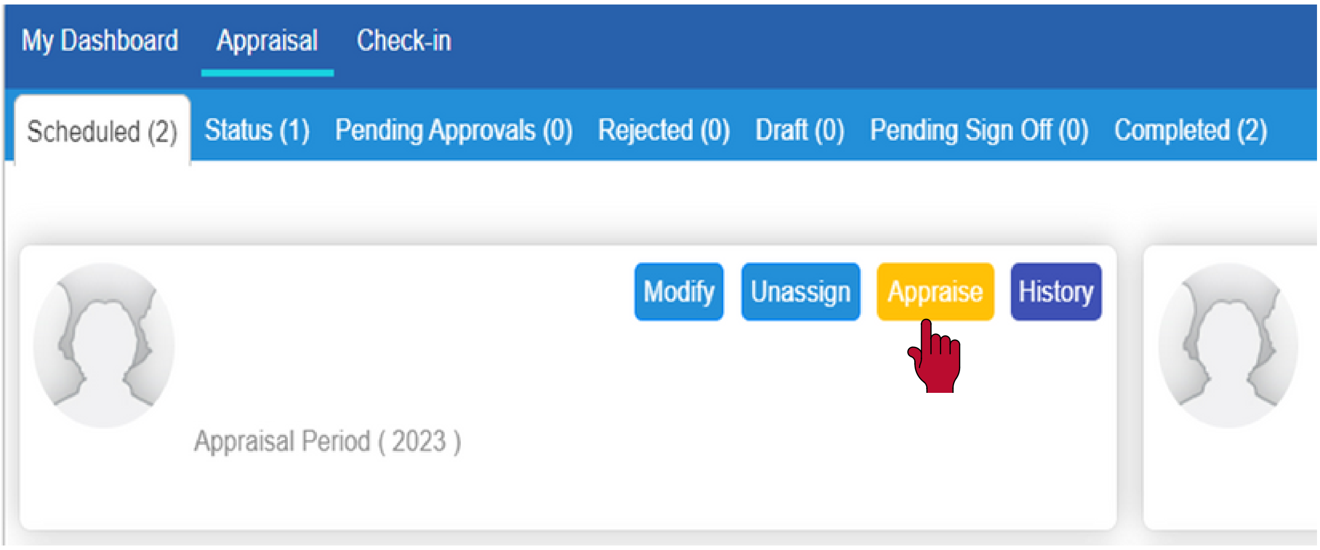


13. Select **ok** on the pop up and the form will roll back to your direct report. They will need to select ***My Appraisal – Self*** to view their self-review.



14. If your direct report(s) feedback expired; then, follow these steps to roll back the appraisal for their acknowledgement.

15. On your home screen, scroll to the top and select ***appraisal*** and appraise on the employee.



16. First, select *workflow;* then, select the *roll back* button in the workflow pop up. Go back to the appraisal and select *roll back* to roll back the appraisal.

17. The appraisal should now be visible under the appraisal section in the manager(s) view. Select ***appraise*** and submit the appraisal again for your employee's feedback/ acknowledgement.
*If you do not see the appraisal in your view; then, select the roll back button again.