Step-By-Step Guide

Bullseye Performance Management Tool

Employee Edition
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Performance Management User Guide
Introduction to Performance Management

The Performance Management Cycle consists of the following steps:
1. Starting the Review Cycle: Setting Goals (Optional)
2. Documenting and completing your Mid-Year review
3. Self-Evaluation and Year-end review
4. Providing 360 Review Feedback
5. Additional Tools
   1. Check-Ins
   2. Comment Writer
   3. Taking Notes
   4. Historical Documents

For questions or concerns please contact Talent Management at talent.management@emory.edu
Performance Management User Guide
Starting the Review Cycle: Setting Goals (Optional)

Although optional, it is highly recommended that you set some goals for the year. This is best done at the beginning of the year. You and your manager should work together on setting goals. Feedback should be provided on a frequent and regular basis regarding goal progress, in addition to the Mid-Year and End-of-Year review. This can be done easily using the Goals tool.

For questions or concerns please contact talent.management@emory.edu
1) Begin by going to the Human Resources page and selecting “Self-Service Login.”

2) Type in your user name (Network ID) and password.
3) Select the “Talent Mgt (incl. Performance)” tile.

4) Type in your username (Network ID) and password where you will be sent to the Bullseye Engagement system.
5) Here you will be able to view your dashboard which includes your personal profile and your home page. You will be able to provide your personal information, career history, qualifications or any other additional information you would like to provide. Note: this is optional.

6) To create your own goals, you will need to select the “My Goals” option from the menu on the left side of the page.
7) All current, past or requested goals will be visible under your goals. To create a goal for yourself, select create/request goal.

8) A pop-up box will appear where you can fill out your goal name, progress type, importance and start/end date. All other criteria is optional. Once completed, select request goal(s) where it will be sent to your manager.

| Goal Name: | Learning Excel |
| Goal Code: | LANS1153 |
| Goal Description: | I want to learn how to be more efficient in Excel. |

- **Complete/Incomplete**: goals that are measured 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.
9) Your manager will have the option to approve, or revise, your goal. You will receive a notification informing you of what your manager has decided to do on your requested goal(s).

10) Once your goal has been approved, it will be visible under your current goals. You will then be able to track your progress and provide any comments. You can have as many goals as you want.

11) If your manager has assigned a goal to you, you will be notified on your home dashboard, and it will be listed under your current goals.

12) That’s it! You can now provide updates on your goal progress throughout the year, and your manager can respond with feedback as well. Each time you provide an update your manager will be notified so they can respond.
Performance Management User Guide
Self-Appraisal: Completing your Mid-Year Review

Your 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 to take notes whenever you wish. 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.

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). It is meant to be an easy way to gather some feedback at the mid-point of the review cycle so any changes/improvements needed can be addressed before the end of the year.

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 more detailed information regarding competencies, click here. For questions or concerns please contact talent.management@emory.edu
1. To access your mid-year performance document, go to the “Talent Mgt (incl. Performance)” tile in the HR system.

2. Type in your user name (Network ID) and password.
3) Select “My Check In” on the left side of your screen.

4) Here you will be able to view your current, or archived, check ins. Select view and you will be able to provide your own comments and view your manager’s comments (when submitted).
5) You will be able to provide your own comments and view your manager’s comments (if provided).

6) If you are not ready to share your comments with your manager; select the save draft button. Once you are satisfied with your comments, select share at the top (or bottom) of the screen. Your manager will provide you an overall score and feedback based on your mid-year comments.

7) Once you receive feedback from your manager, you will need to sign off on your form. Go to the bottom of the screen and select the sign off button. A pop-up box will appear confirming if you are ready to sign off. Select yes and you have completed your mid-year form!
Performance Management User Guide
Self-Appraisal: Completing Your Year-End Review

Your self-evaluation form for the Year-End review should be available to you shortly after the middle of the year (either November or March depending on whether you are on the academic or fiscal year calendar). The self-evaluation form is accessible at any time when you have a year-end appraisal form. After your manager provides comments and ratings on your year-end form, you should both have a face-to-face discussion.

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1) Click on the "Talent Mgt (incl. Performance)" tile.

2) Type in your username (Network ID) and password.
3) Click on the left side of your dashboard and select “My Appraisal.”

From here, make sure self is highlighted and select appraise. You can now begin your self-evaluation.
5) Here you will be able to view the competencies, add documents and provide comments on your self evaluation. If you need help writing your comments, click the behavioral examples link which will direct you to examples that have been created.

6) To add a document, scroll to the bottom of the self-review and select the review documents button. Choose your file and upload your document. A pop-up box will appear confirming that you wish to upload this document. Select ok and your document will be added.
7) When you have completed your self review, select **submit** and a pop-up box will appear confirming you are ready to send your self review to your manager. Select **yes** and your form has now been completed.

8) Your manager will view your self-evaluation and write your year-end evaluation. Your manager should then request a meeting with you to discuss your review. After the meeting, you will receive a notification to provide feedback based on your year-end review. To view your year-end, you will need to select “My Appraisal” on your dashboard. Then select **feedback** to view your rated year-end evaluation.
9) After your discussion with your manager, you will have the opportunity to provide any comments before acknowledging your form. Select **acknowledge** and a pop-up box will appear asking if you would like to provide comments. If you would like to provide comments, select **yes**. If not, select no and move to step 11.

10) To provide your own personal comments, select the general comments option. If not, you can select a comment from any of the provided categories in the drop down (see section V: Comment Writer). Just select your comment and click add. To view comments provided from your manager, select the required comments button. Once completed, select acknowledge and no when the pop-up box appears. You will see another pop-up stating that your feedback has been submitted.

11) You’re all done! Your manager will sign off on your form. If you added comments, your manager will reach out to you if needed.
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Providing 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. Direct reports are asked by their supervisor’s leader to provide comments to the following 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 upward feedback (360) is entirely optional but strongly encouraged. All feedback will be kept anonymous.

**How to write comments:** 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.

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* A supervisor must have two or more direct reports to use this feature.
1) Begin by going to the Human Resources page and selecting “Self-Service Login.”

2) Click on the “Talent Mgt (incl. Performance)” tile.
3) Type in your username (Network ID) and password.

4) Click on the left side of your dashboard and select “My Appraisal.”
5) From here, see if “360” is highlighted. If so, select Appraise. You can now begin your 360 review.

6) You can fill out any or all of the three questions provided about your manager. Once complete, select submit and your form has now been completed. You’re all done!
Performance Management User Guide
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.

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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.

2) Then, select the *initiate* button.

![Dashboard Screenshot]

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**Additional Tools**
3) As there is only one form in the drop down, select the general feedback form and assign. General feedback allows you and your manager 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 your mid-year form; however, there is no overall score. 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 manager, 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. Continue providing feedback as this form will not be submitted until you are ready to share.
5) **Comment Writer Tool:**
The comment writer is only visible in the year-end evaluation forms. If you would like to use the comments 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. Select save&close to save your comments.
7) **Notes Tool**: To create your own personal notes, go to your home dashboard and select **My Notes**.

8) From here, select add notes.
9) 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.

10) Your note will now be visible under your notes on your dashboard. The notes you create are not visible to your manager. If your manager creates a note for you, and chooses to share it, you will be able to view it in this section and provide a response.
11) **Adding Documents**

To add documents to your profile, on your home dashboard select the edit button.

![Documentation Tab](image)

12) 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 to add the document.
13) 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.
14) **Historical Documents:**
If you would like to view your previous evaluation(s), select “My Appraisal” on your dashboard.

15) Go to the **Review History** section where your rating will appear along with your documents. Just a reminder, that the rating column displays the average across the competencies and **not** the final score assigned. You will need to open your actual form to view your final score. This is also the same for the self rating as the "0.00" is not correct since the self review does not have ratings. Select manager completed to view your year-end evaluation or self completed to view your self review.