STEP-BY-STEP GUIDE

BULLSEYE PERFORMANCE MANAGEMENT TOOL

EMPLOYEE EDITION

EMORY +YOU

Your Learning

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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
    - Check-Ins
    - Comment Writer
    - Taking Notes
    - Historical Documents

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

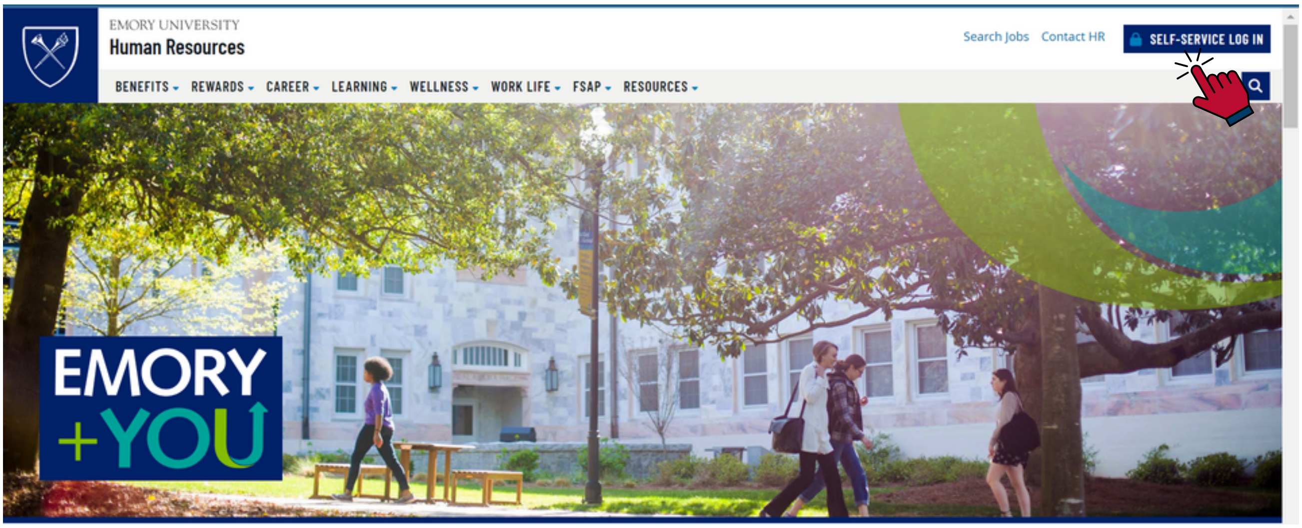
PERFORMANCE MANAGEMENT USER GUIDE

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.

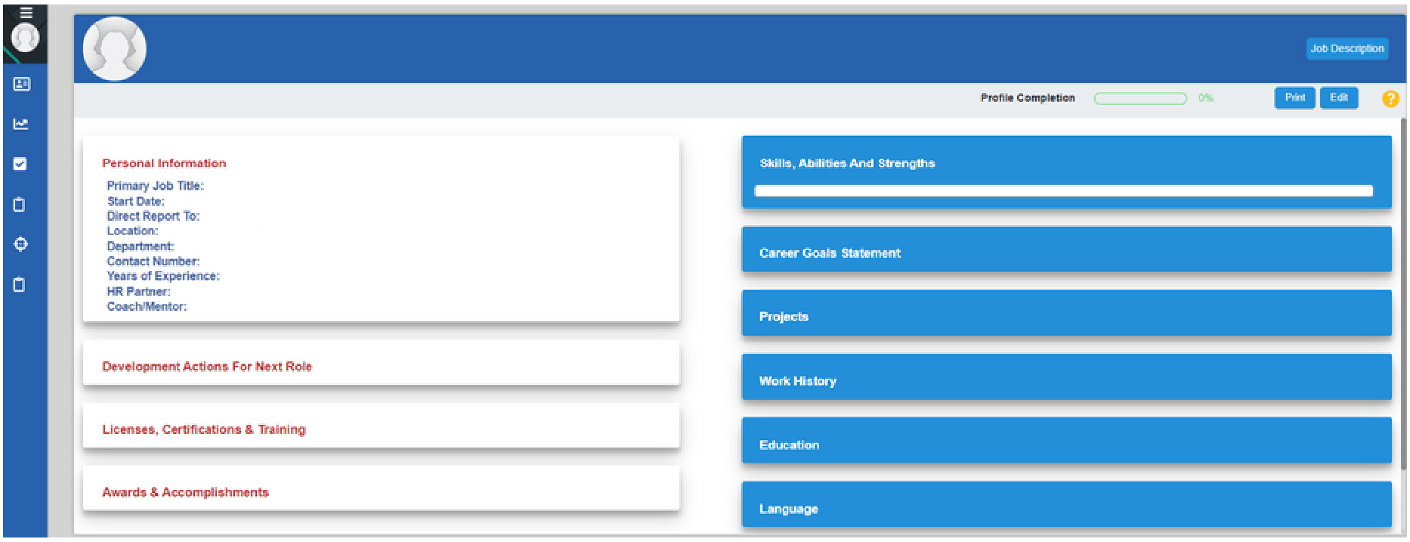
For questions or concerns please contact Talent Management at talent.management@emory.edu

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

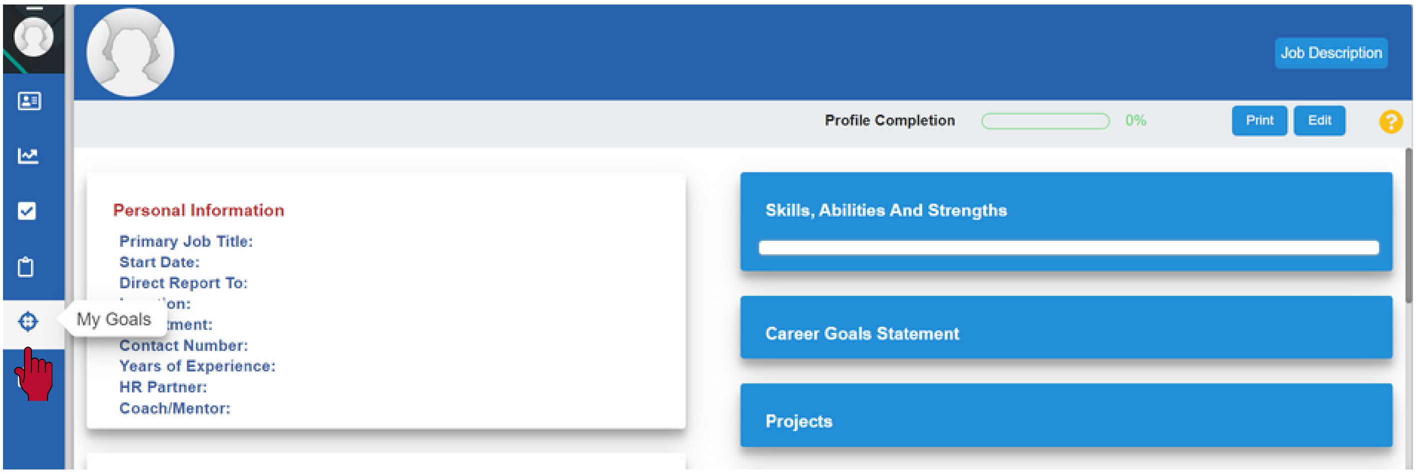


2. Select the **Talent Mgt (incl. Performance)** tile. You will need to log in with your Emory credentials to access the Performance Management site.

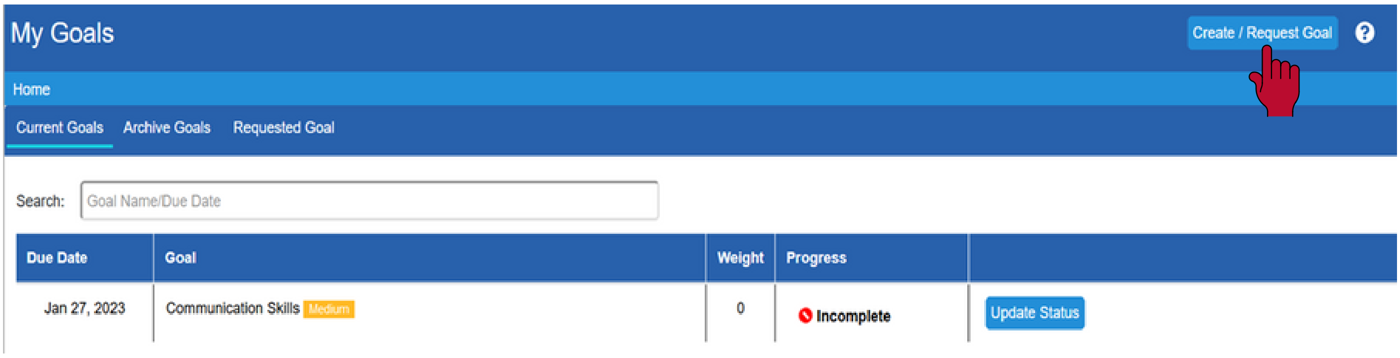
3. Once logged in, you will be able to view your profile screen. On this page, you can edit your career history, qualifications or any other additional information you would like to provide. Note: this is optional.



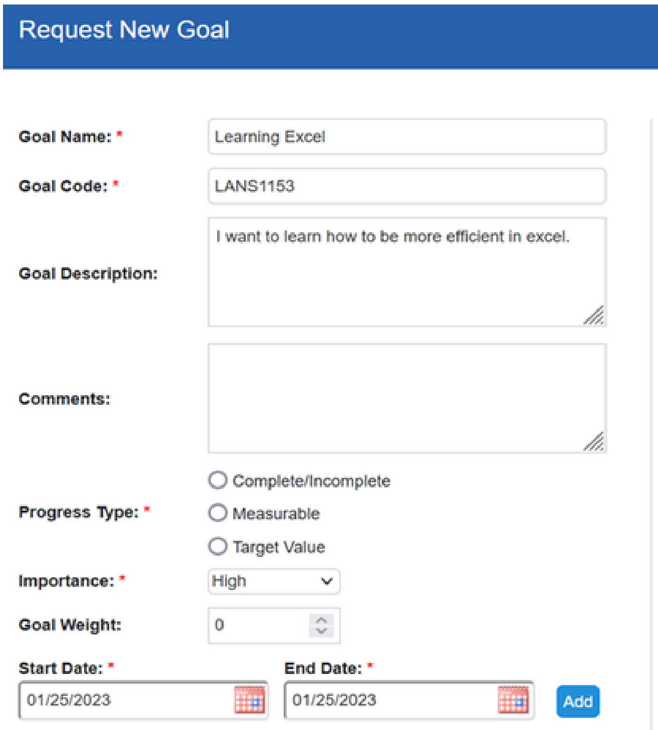
4. To create your own goals, you will need to select **My Goals** from the menu on the left side of the page.



5. All current, past or requested goals will be visible under your my goals section. To create a goal for yourself, select ***create/request goal***.



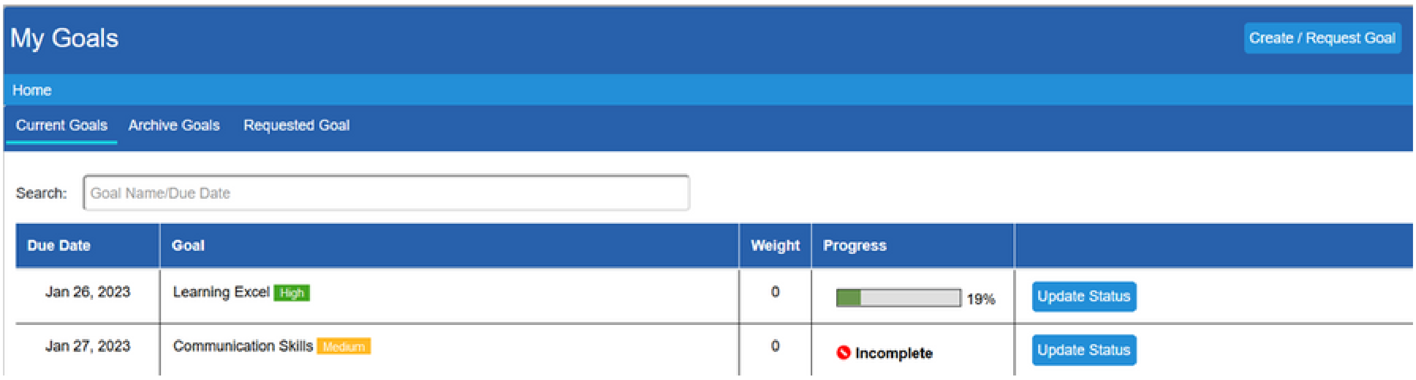
6. A pop-up box will appear where you can fill out your goal name, progress type, importance and start/ end date. All other criteria is optional. Once completed, select ***add*** and then select ***request goal(s)*** where it will then be sent to your manager.



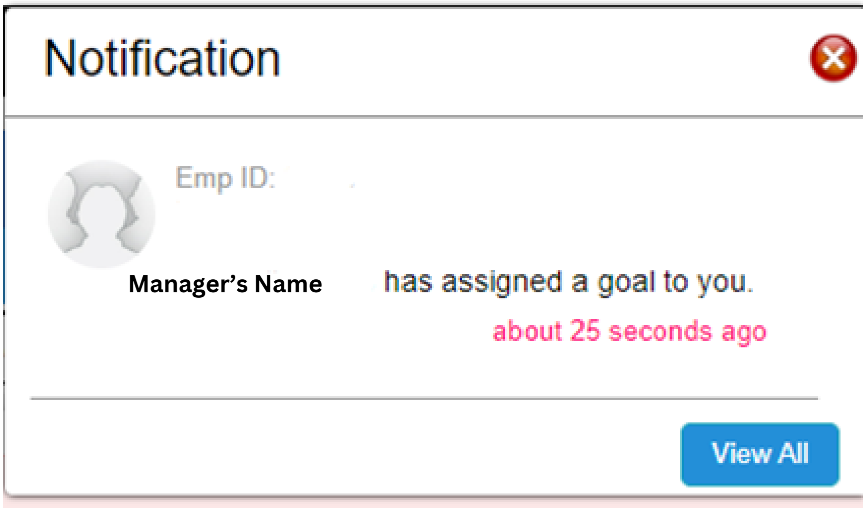
- ***Complete/ Incomplete:*** Goals that are measured by whether they have been completed or not.
- ***Measurable:*** Progress bar with a completion percentage up to 100%.
- ***Target Value:*** Goals with a set value of achievement.
- ***Goal Weight (Optional)***: Alternative means for a user to assign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

7. Your manager will have the option to approve, or reject, your goal. You will receive a email, and notification, informing you if your manager has approved/ rejected your requested goal(s).

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



9. If your manager has assigned a goal to you, you will be notified by email/notification, and it will be visible under your current goals.



10. 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 is all optional. 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. 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

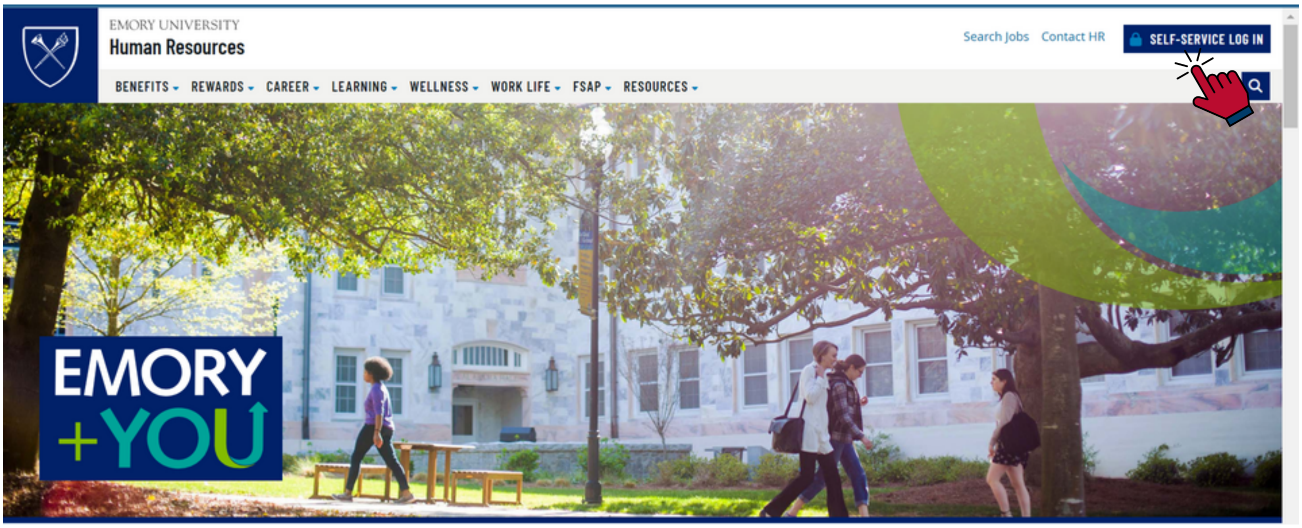
- Delivering Results
- Problem Solving
- Functional Knowledge &Skills
- Service to Others/Customers

HOW: Competencies that speak to how you do your job

- Diversity, Equity and Inclusion
- Collaboration
- Communication
- Taking Initiative

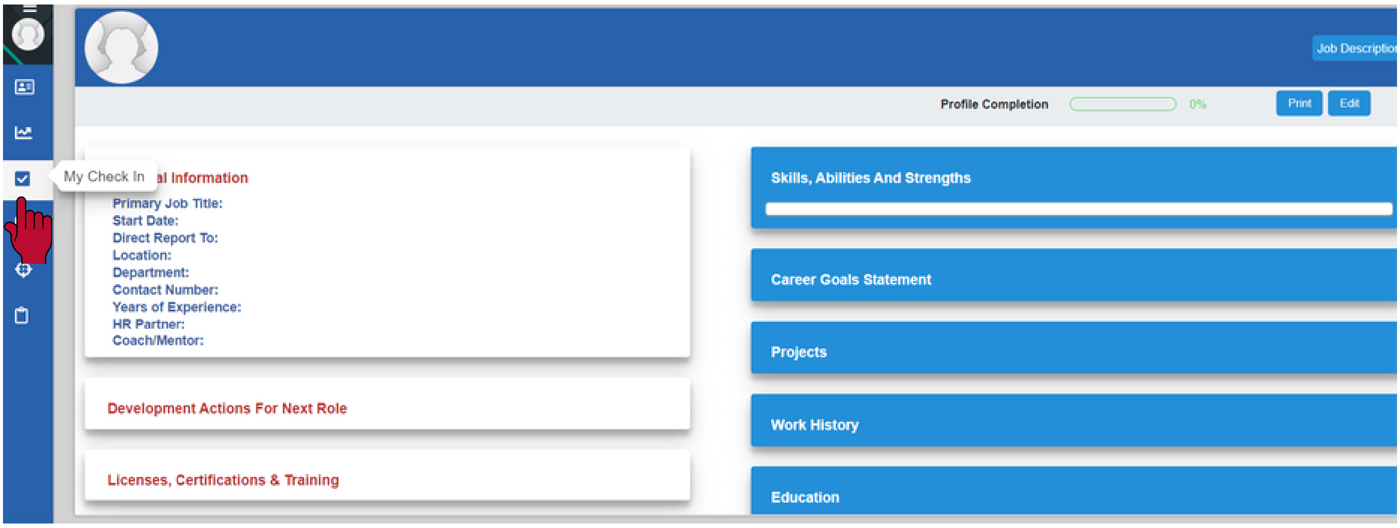
For more detailed information regarding competencies, click here.
For questions or concerns please contact talent.management@emory.edu

1. To access your mid-year, go to the Self-Service login page where you will be directed to the HR Portal.

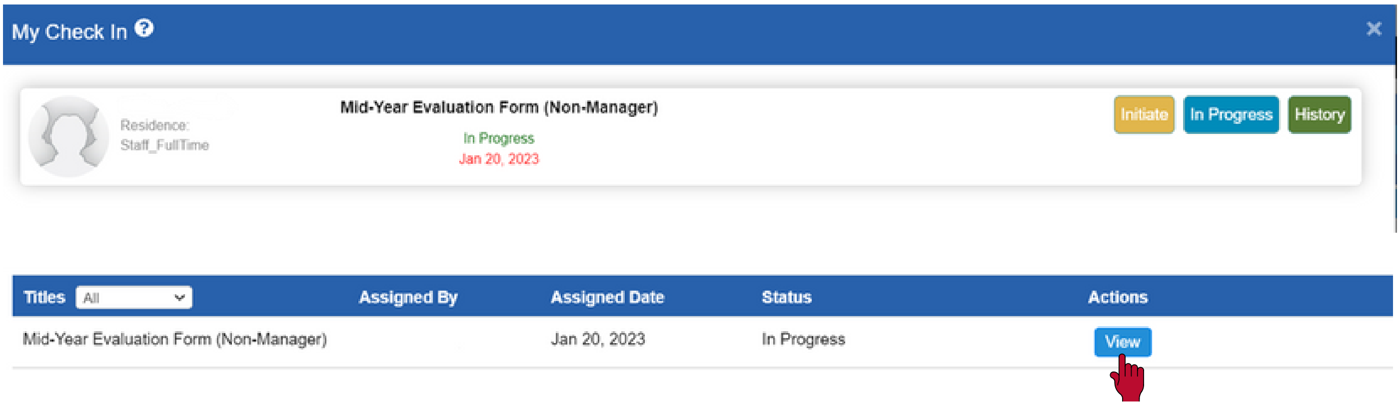


2. Select the **Talent Mgt (incl. Performance)** tile. You will need to log in with your Emory credentials to access the Performance Management site.

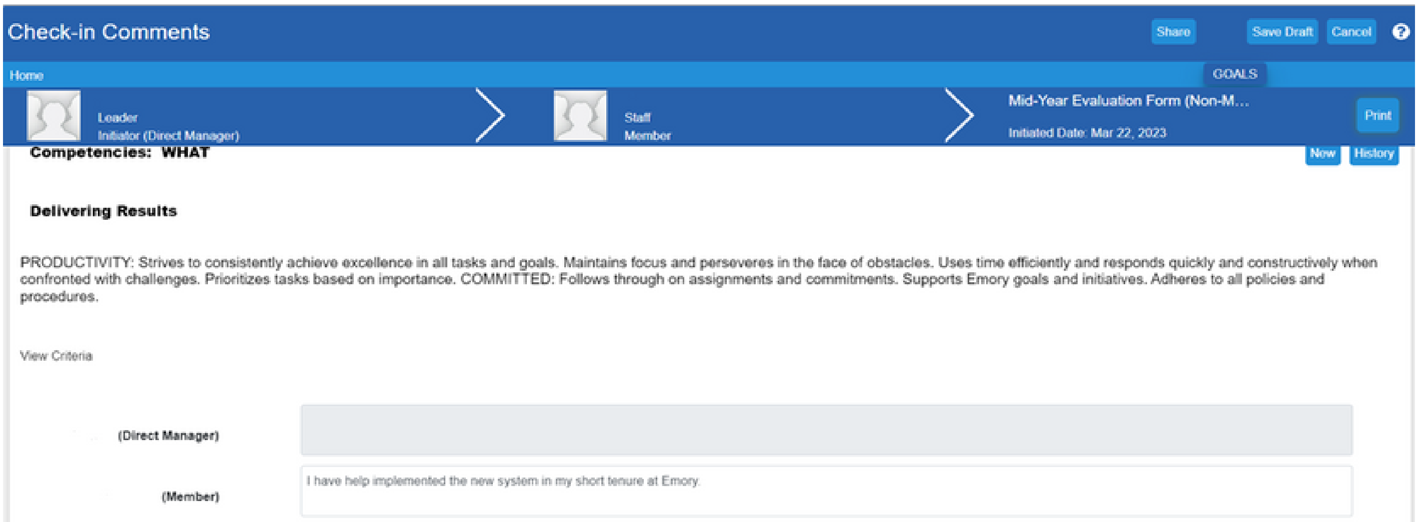
3. Select **My Check In** on the left side of your screen.



4. Select ***history*** to view your completed check- ins. Select ***view*** to view your current check-in. This is where you will be able to provide your own comments and view your manager's comments (when submitted).



5. This is what your mid-year form looks like. You can begin to provide your comments on the competencies.



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 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. (*Please remember to sign off when you no longer need to add comments. We cannot reopen mid-year forms.*) Select ***yes*** and your mid-year is now complete!

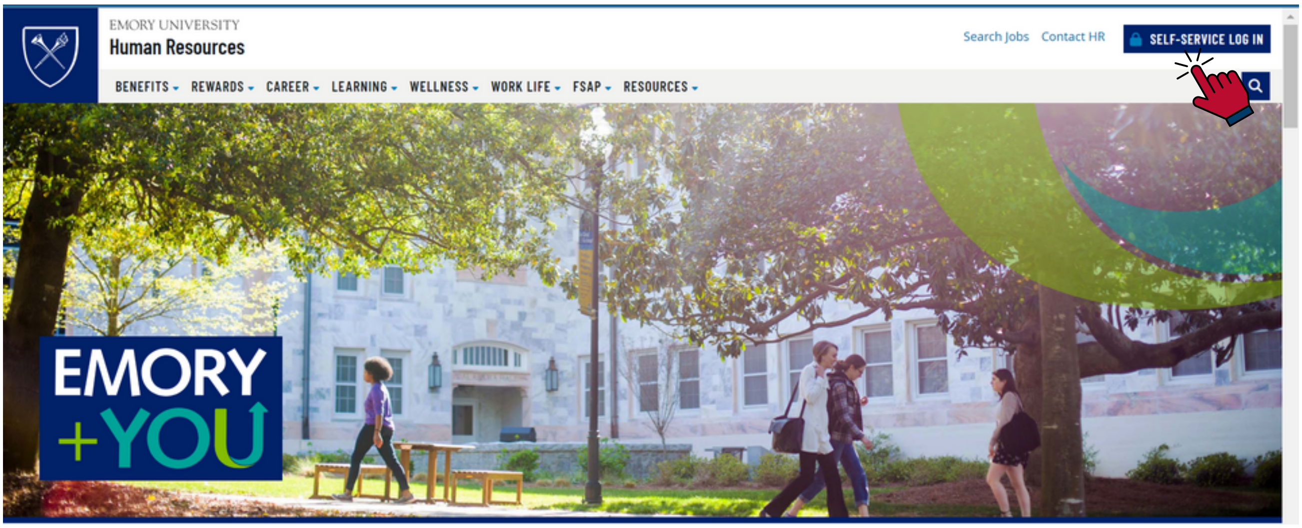
PERFORMANCE MANAGEMENT USER GUIDE

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 April or May depending on whether you are on the academic or fiscal year calendar). Once the self - evaluation has launched; then, you can begin adding comments. After your manager provides comments and ratings on your year-end form, you should both have a face-to-face discussion.

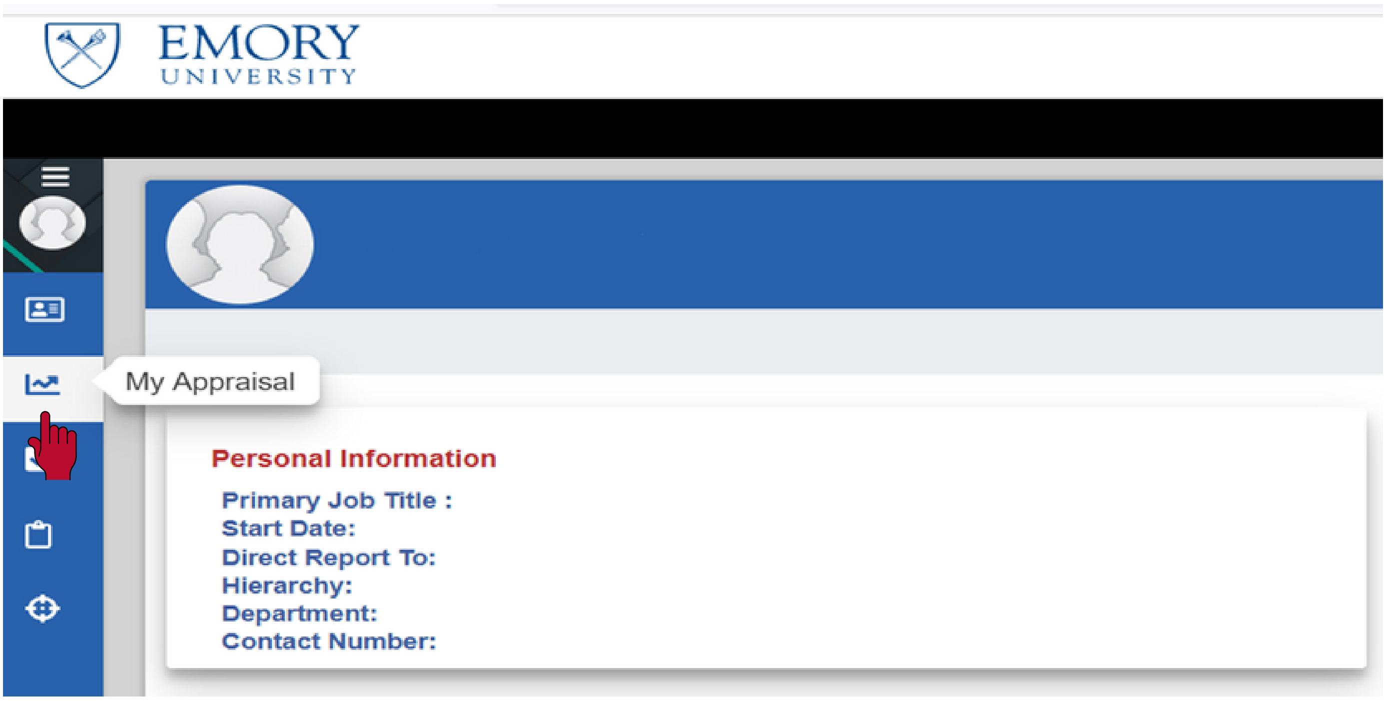
For questions or concerns, please contact the Talent Management Team at talent.management@emory.edu

1. To begin your self-evaluation, go to the Self-Service login page where you will be directed to the HR Portal.

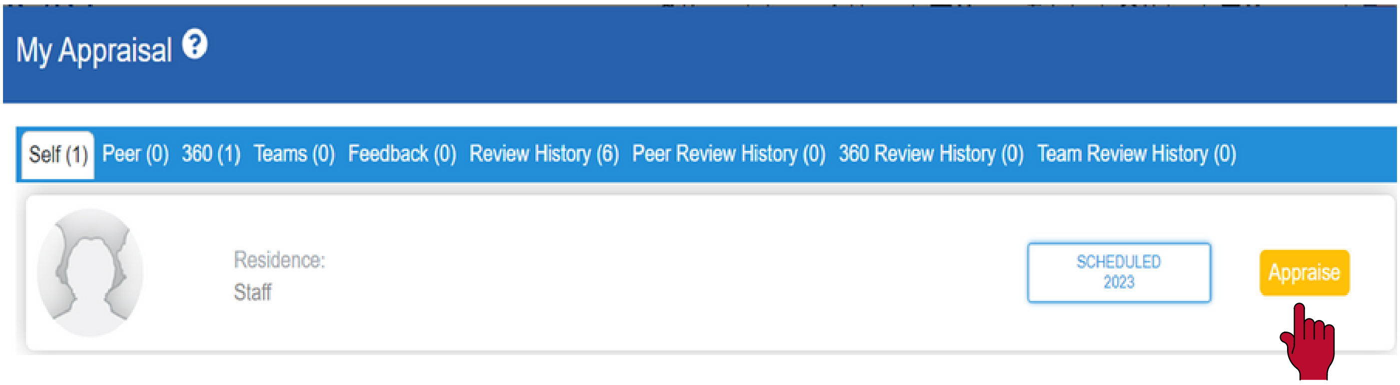


2. Select the **Talent Mgt (incl. Performance)** tile. You will need to log in with your Emory credentials to access the Performance Management site.

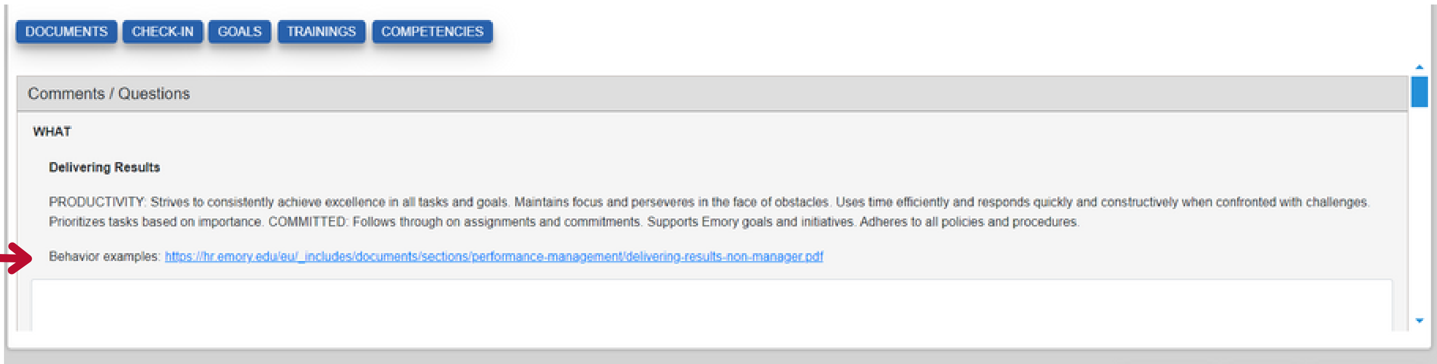
3. Click on the left side of your profile and select **My Appraisal**.



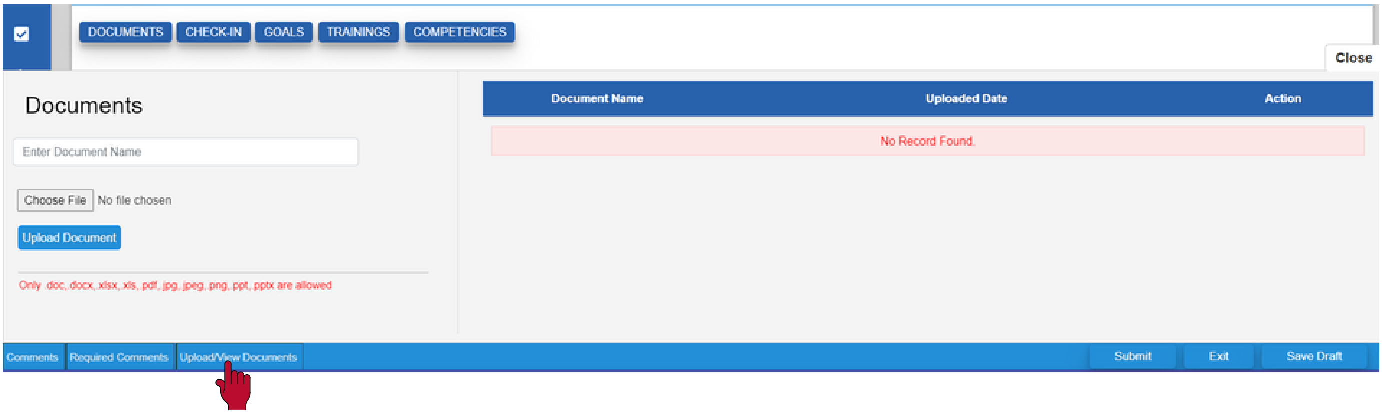
4. From here, make sure ***self*** is highlighted and select appraise. You can now begin your self-evaluation.



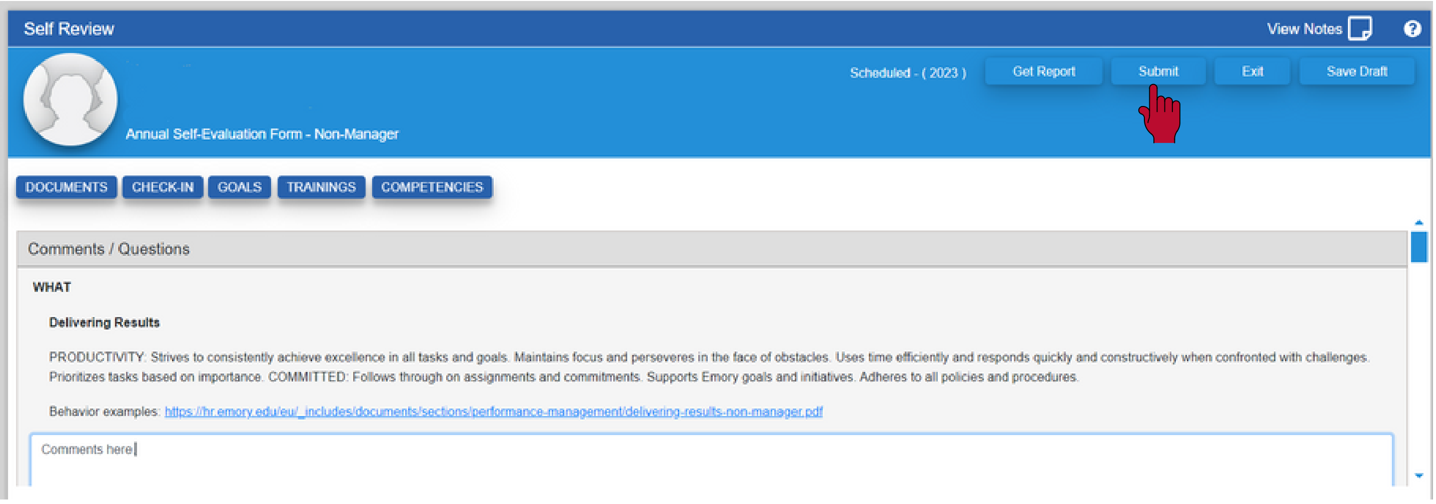
5. Here you will be able to view the competencies, add documents and provide comments on your self evaluation. If you need help writing your comments, click the *behavioral examples* link which will direct you to examples that have been created.



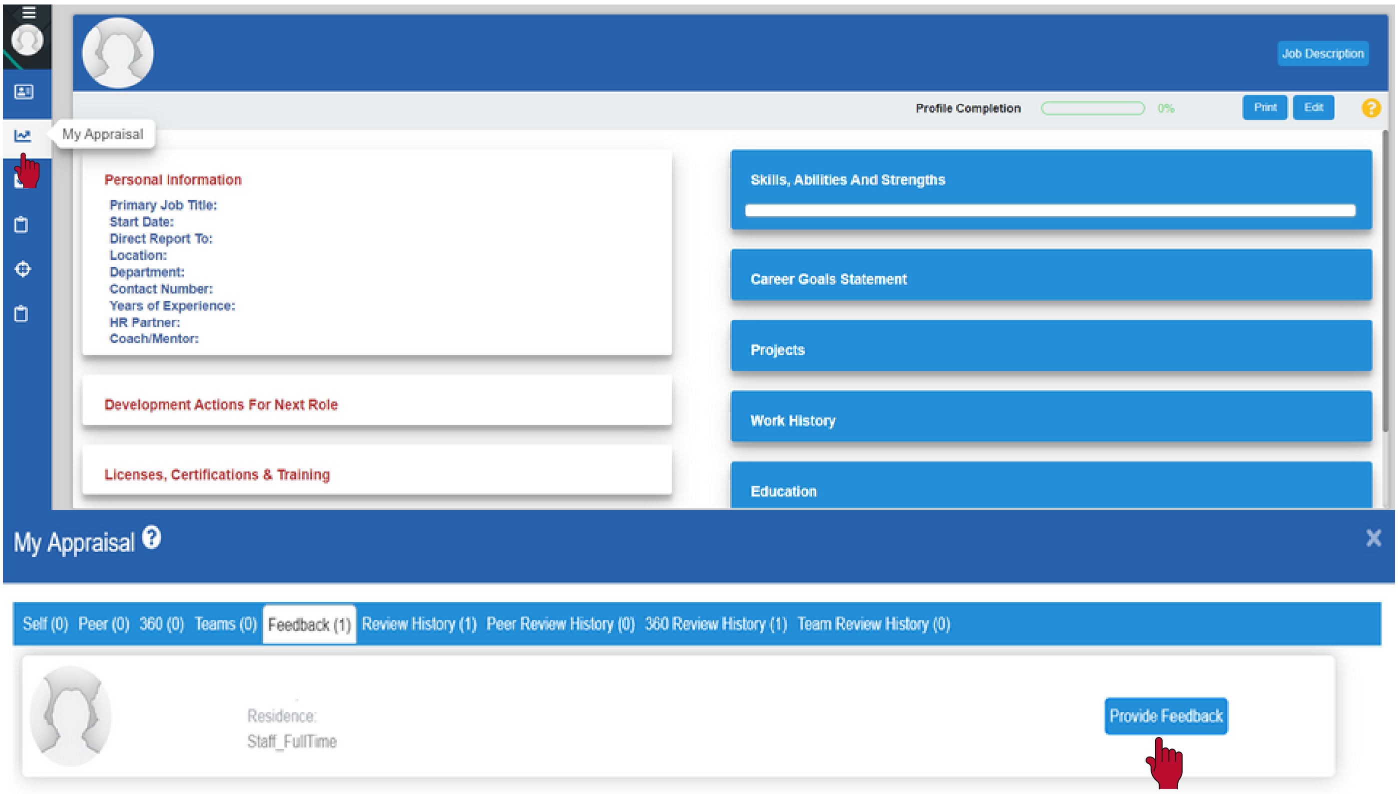
6. To add a document, scroll to the bottom of the self-review and select the ***upload/view documents*** button. Choose your file and upload your document. A pop-up box will appear confirming that you wish to upload this document. Select ***ok*** and your document has now been uploaded.



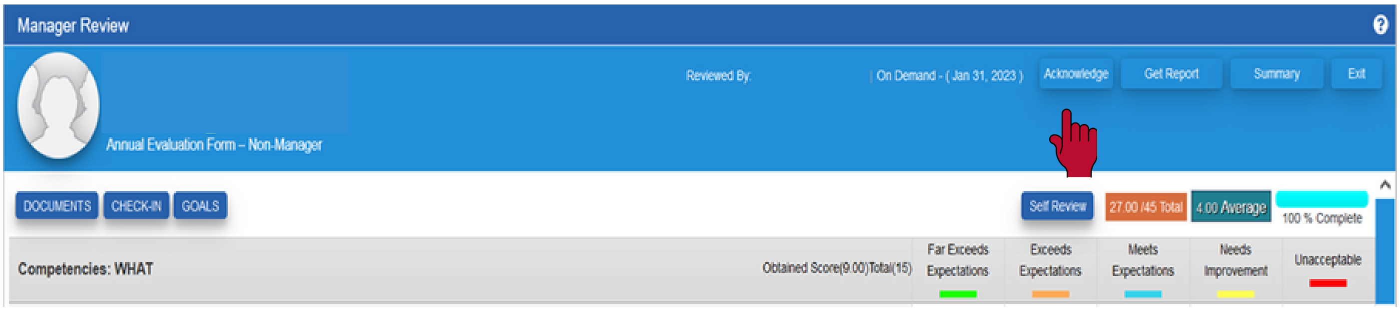
7. When you have completed your self review select ***submit.*** A pop-up box will appear confirming you are ready to send your self review to your manager. Select ***yes*** and your form has now been submitted.



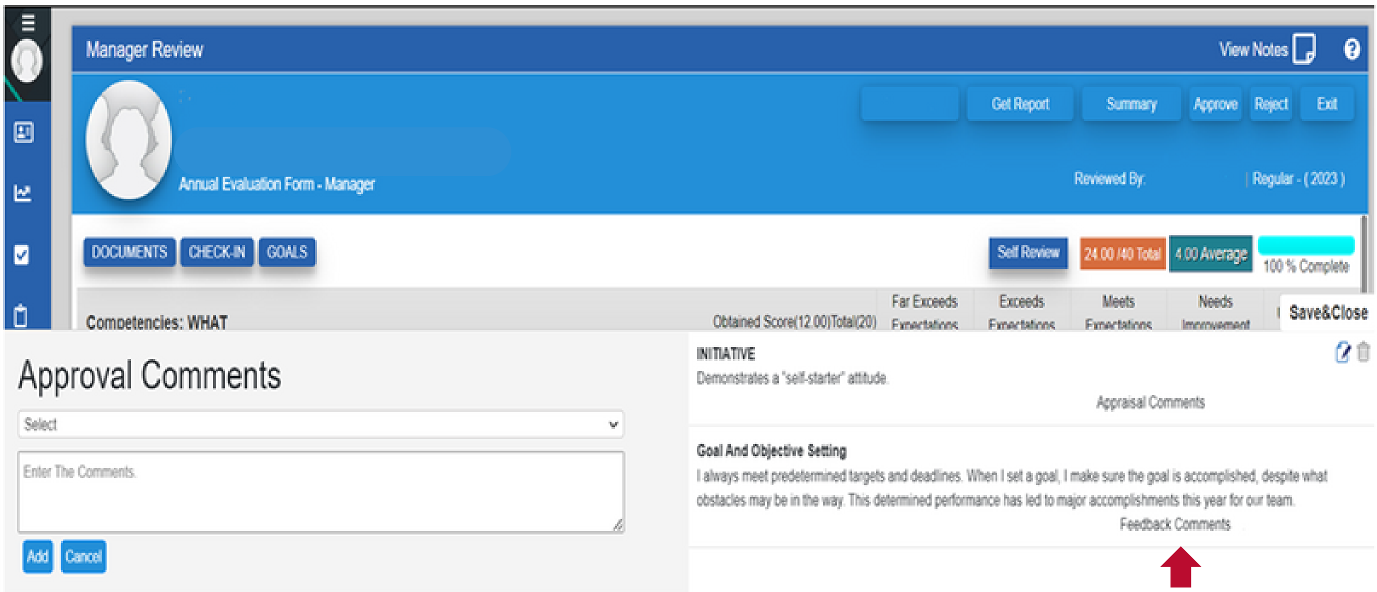
8. Your manager will view your self-evaluation and write your year-end appraisal. Your manager should then request a meeting with you to discuss your appraisal. After the meeting, you will receive a notification to provide feedback based on your year-end appraisal. To view your year-end, you will need to select **My Appraisal** on your dashboard. Then, select ***provide feedback*** to view your rated year-end appraisal.



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. Another pop up will appear confirming 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.

PERFORMANCE MANAGEMENT USER GUIDE

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.

* A supervisor must have two or more direct reports to use this feature.

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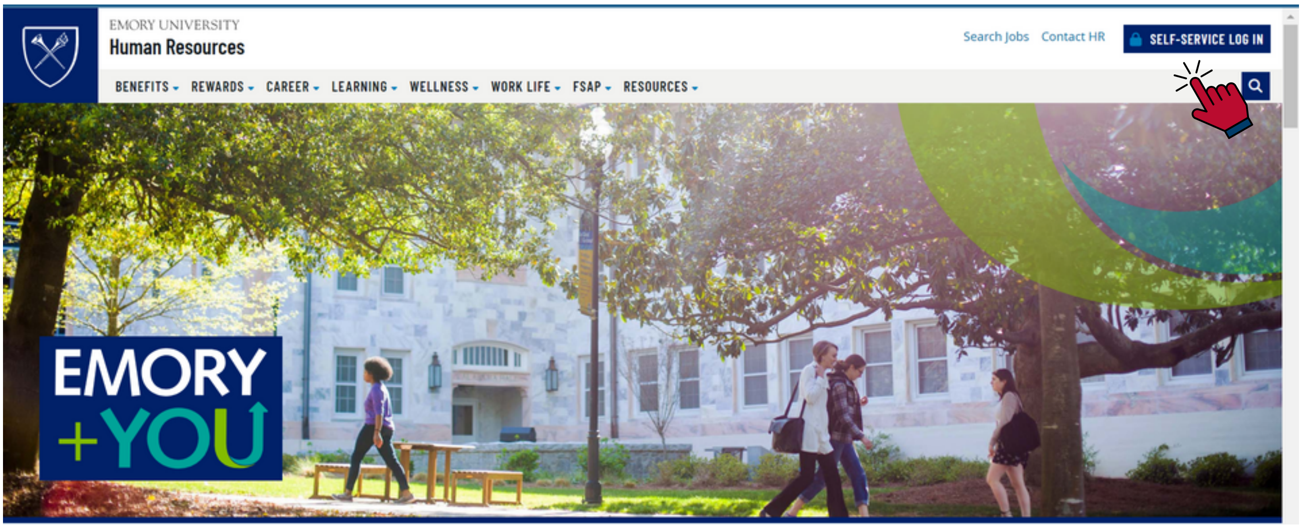
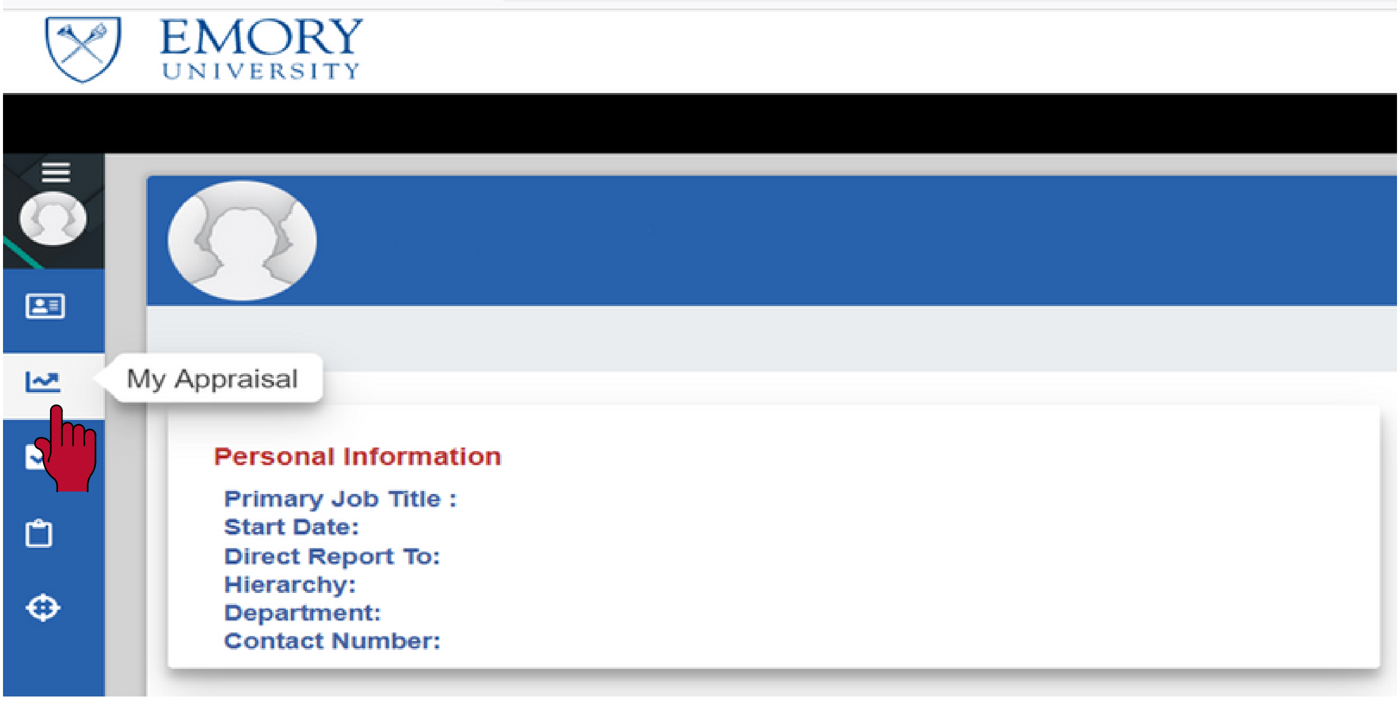
talent.management@emory.edu

1. To begin the 360 Review (Upward Feedback) process for your manager, go to the Self-Service login page where you will be directed to the HR Portal.

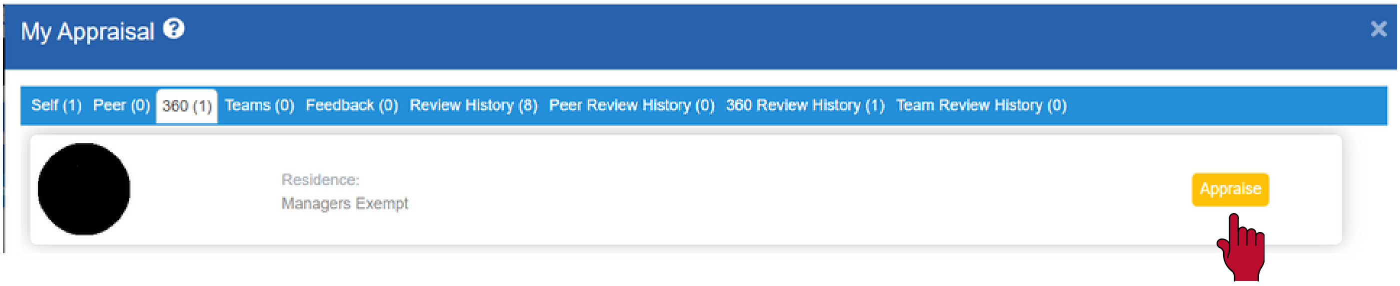


2. Select the **Talent Mgt (incl. Performance)** tile. You will need to log in with your Emory credentials to access the Performance Management site.

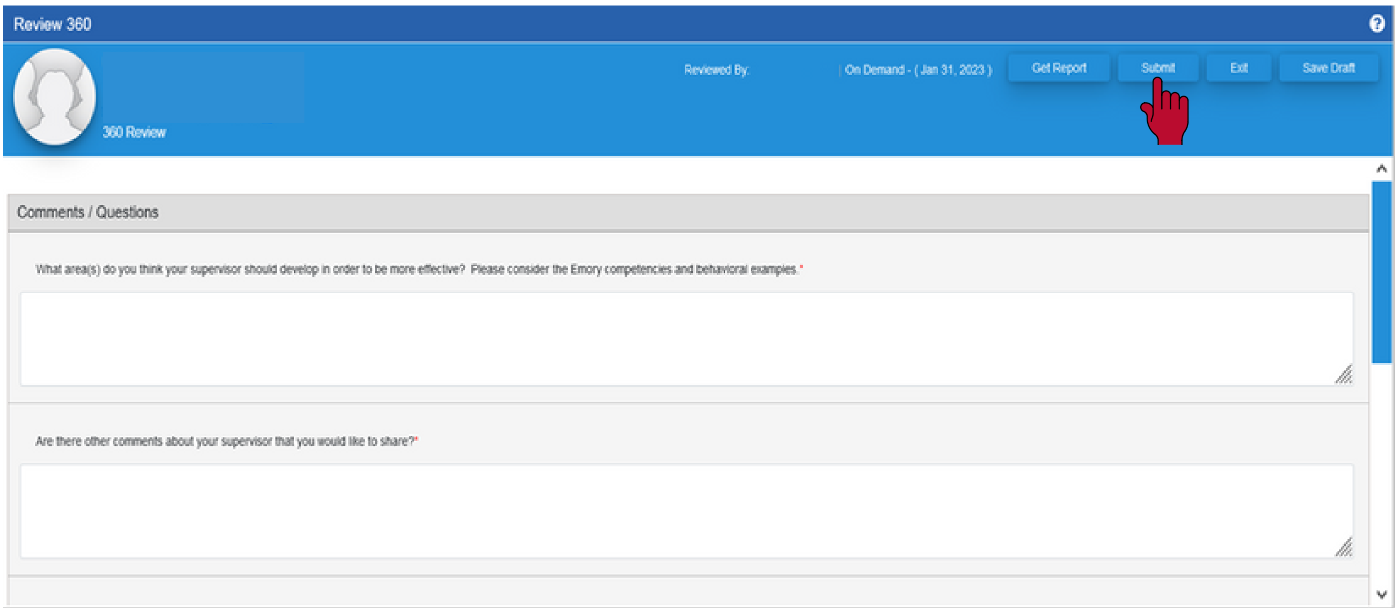
3. On the left side of your profile select **My Appraisal.**



4. Make sure **360** is highlighted and select appraise. You can now begin your 360 Review (Upward Feedback).



5. You can fill out any, or all, 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

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 evaluation
- Open discussion, with no limit, until you are ready to end the conversation

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 to your profile.

Historical Documents

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

Profile Page

This section informs you on how to edit your profile page. To note, your manager and leadership above your manager will be able to view your profile page. However, your colleagues are unable to view your profile.

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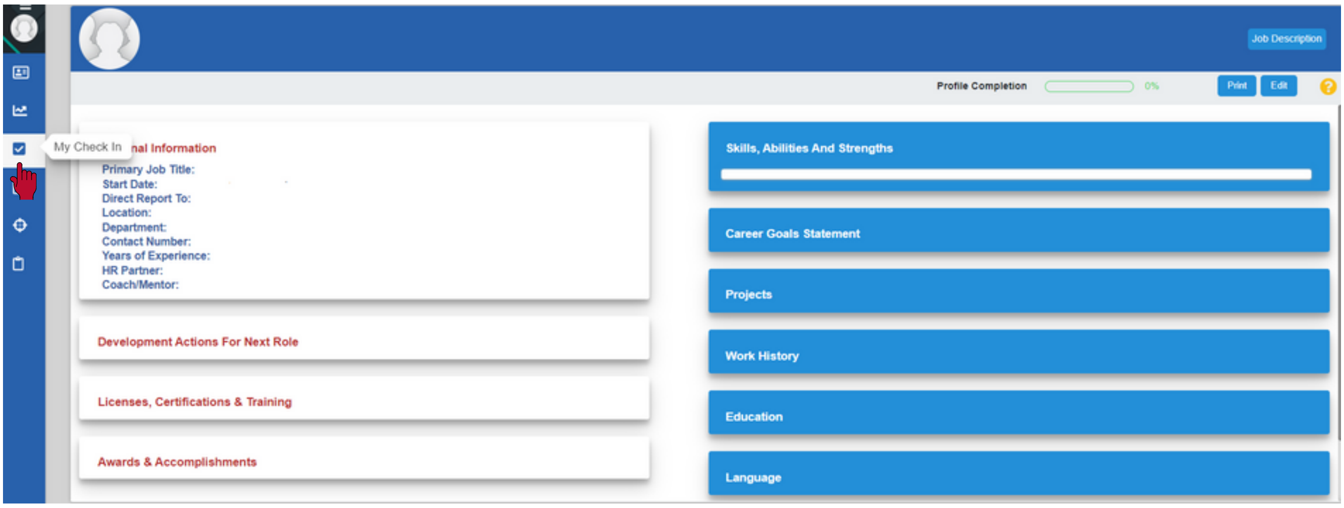
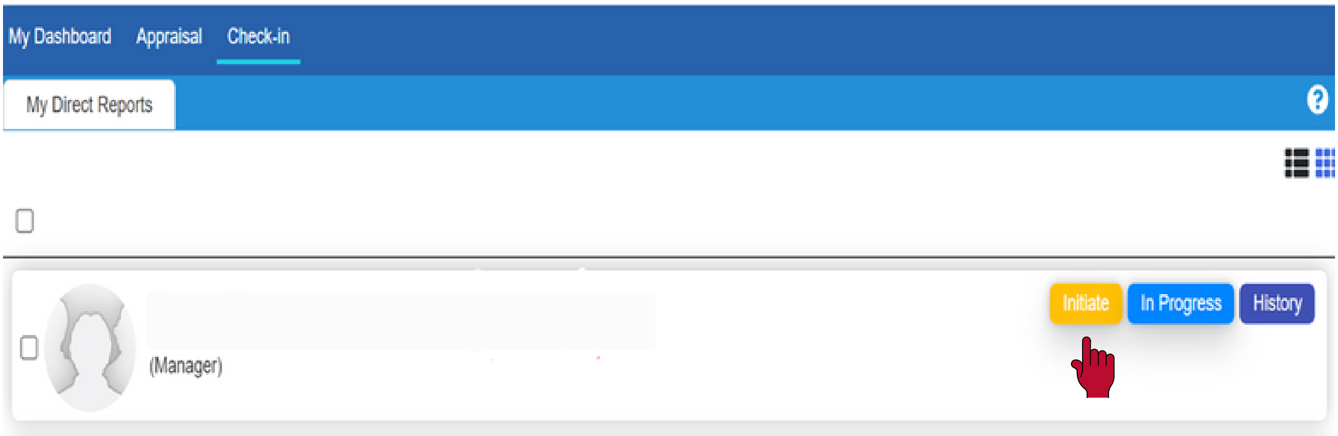
Check In Tool

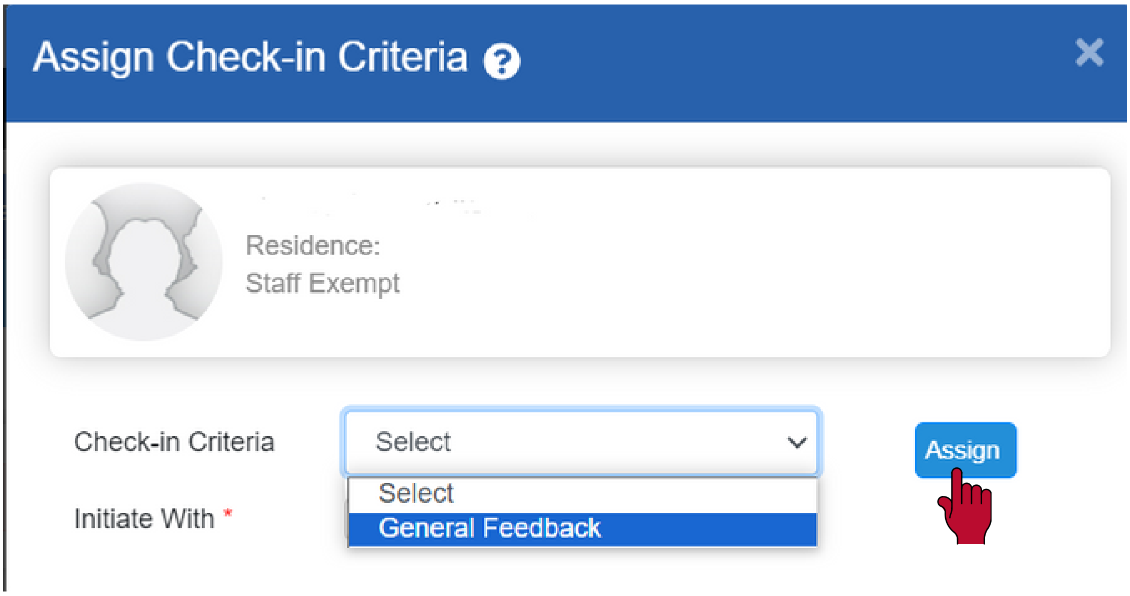
1. If you would like to create a *General Feedback* Check-In, on your home dashboard select **My Check-In**.



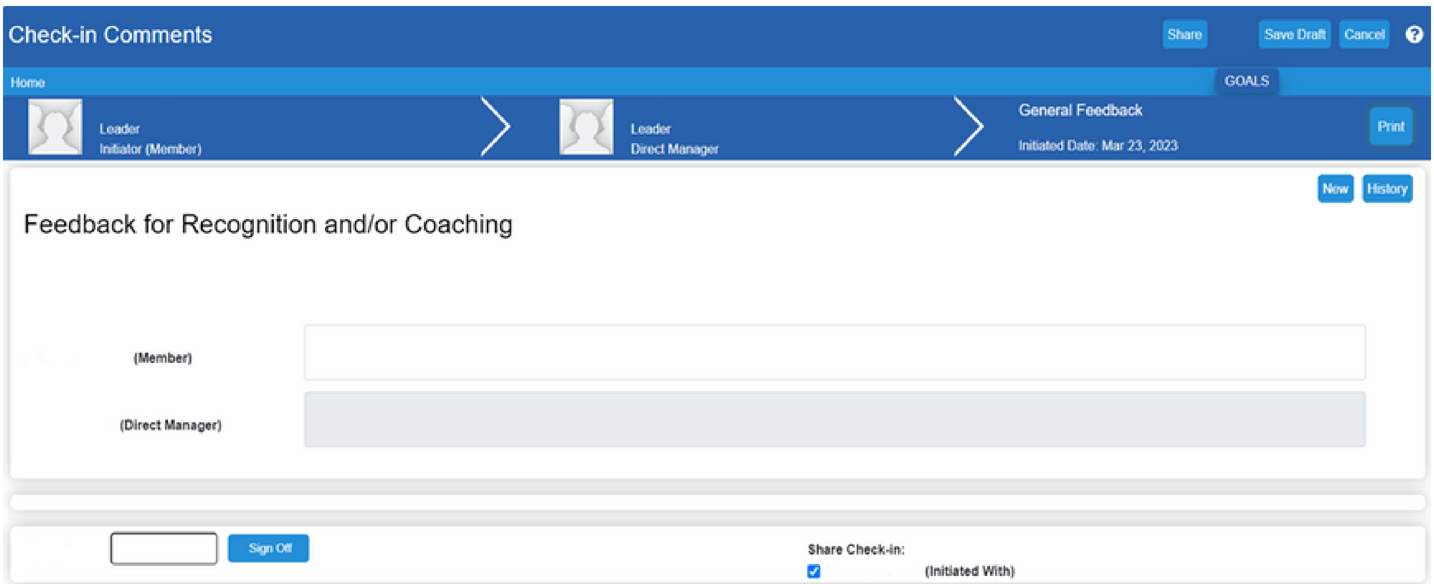
2. Then, select the initiate button.



3. As there is only one form available, in the drop down, select the *general feedback* form and **assign**. General feedback allows you and your manager 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.

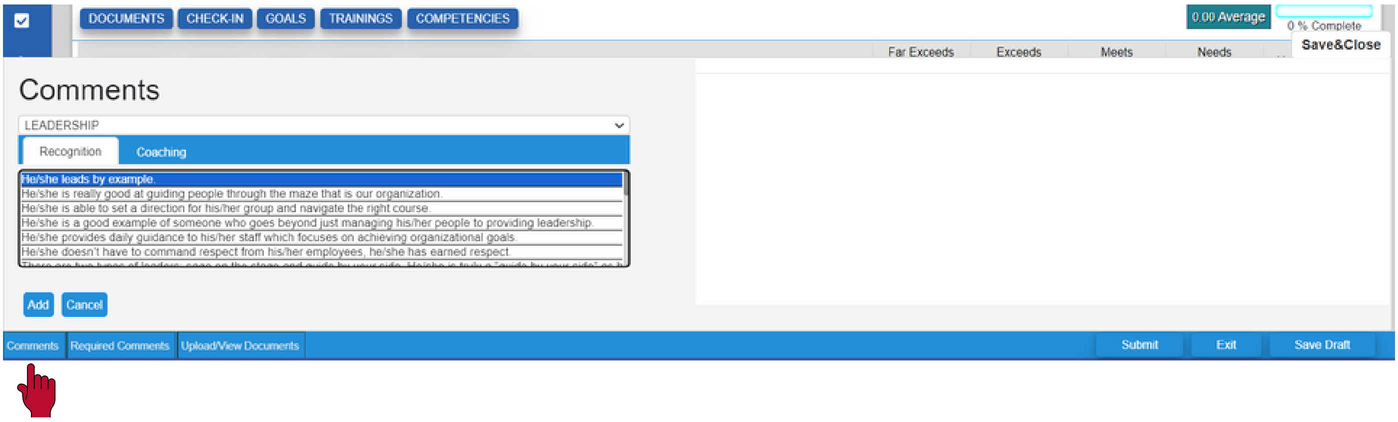


4. This form is similar to the mid-year form; however, there is no overall score. When you are ready to share your comments with your manager, select the ***share*** button at the top. If you are not ready to share, uncheck the *share* check button (at the bottom of the screen) and select the ***save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

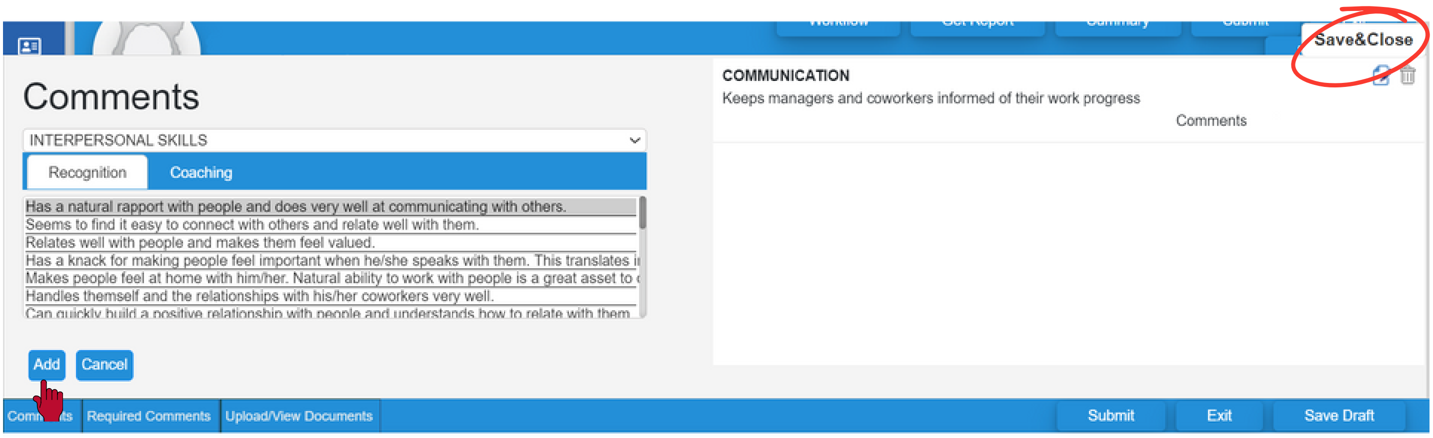


Comment Writer Tool:

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 comments.

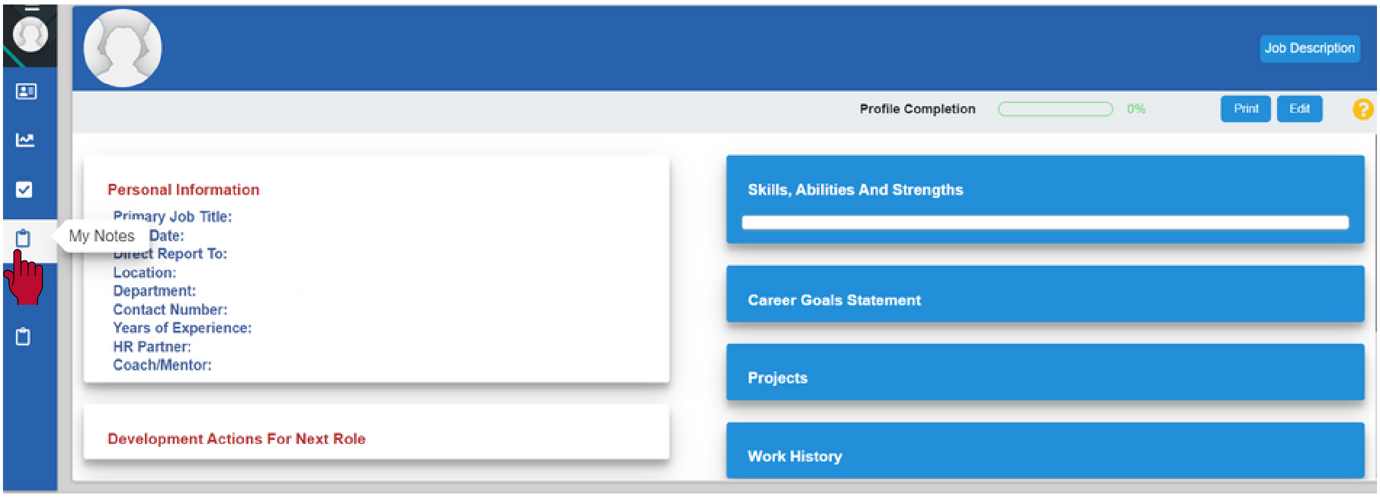


2. When you find the comments you would like to use, select the ***add*** button and they will appear on the right. You can copy, and add, the comments throughout the year-end form. Select ***save &close*** to save your comments.

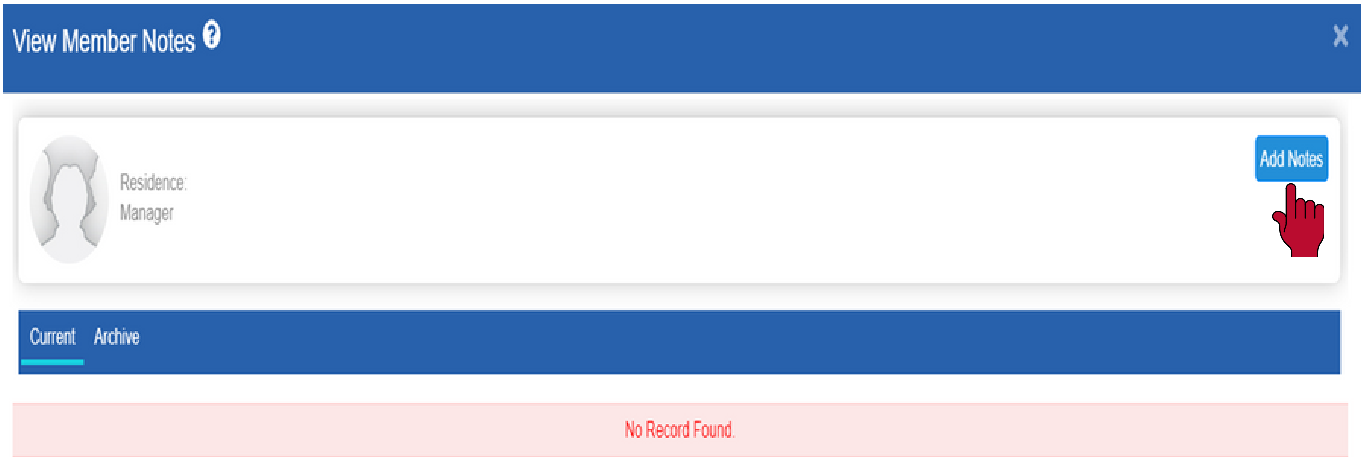


Notes Tool:

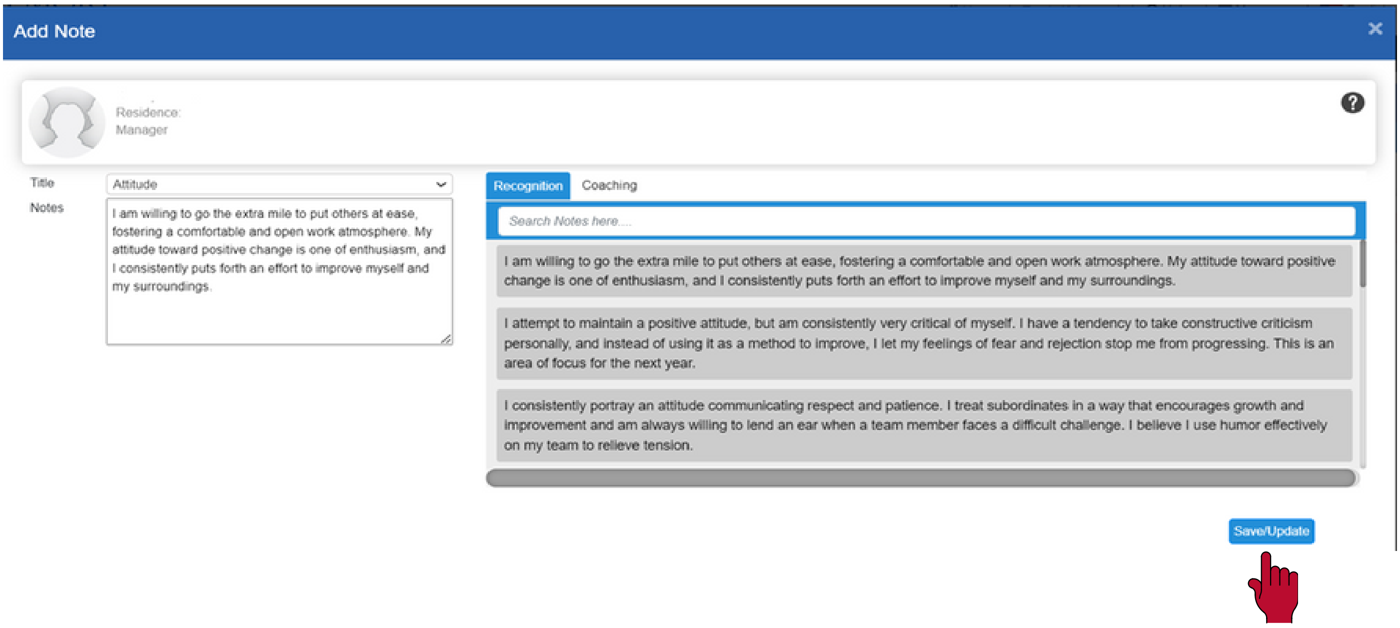
1. To create your own personal notes, on your home dashboard select **My Notes**.



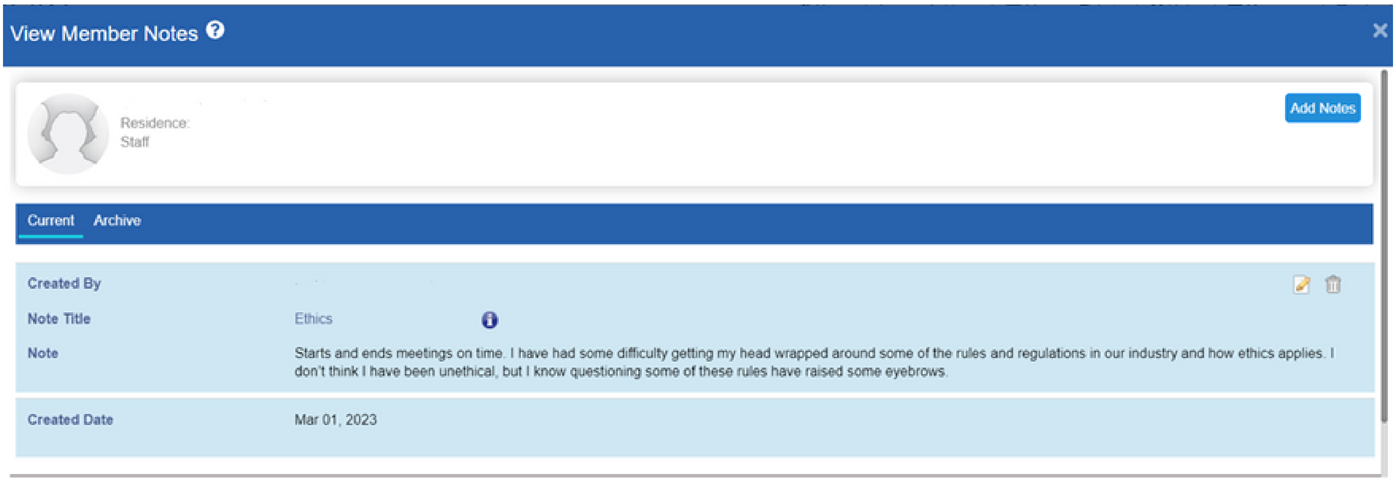
2. Now select *add notes*.



3. Under the title dropdown, there will be multiple categories to choose from (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***.

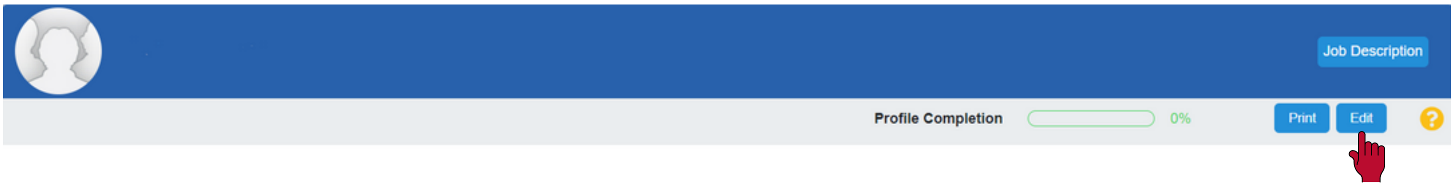


4. Your note will now be visible under your **My Notes** section on your dashboard. The notes you have added are not visible to anyone but you. If your manager creates a note for you, and chooses to share it, you will be able to view it here.

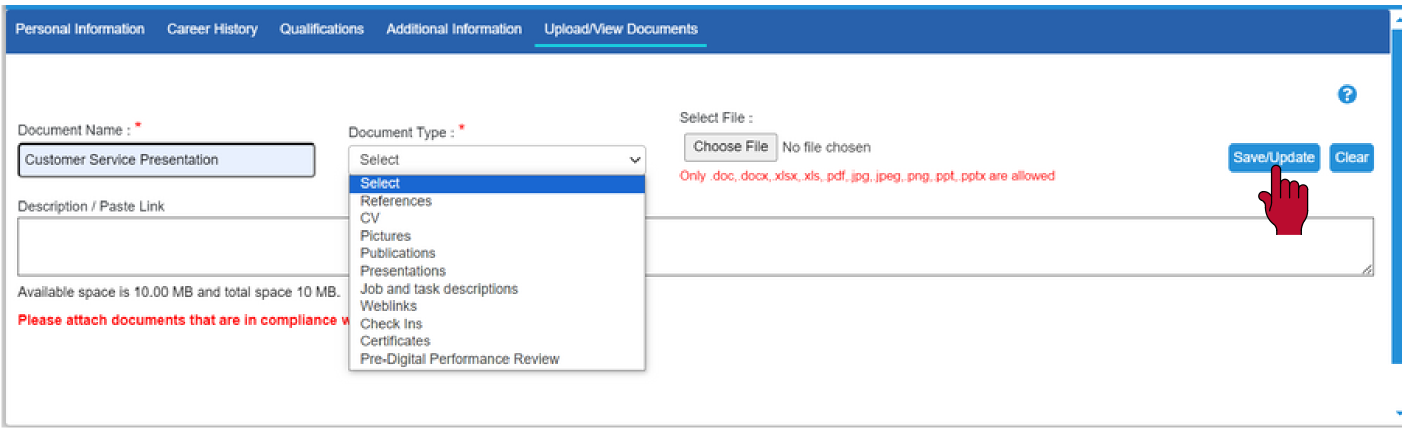


Adding Documents:

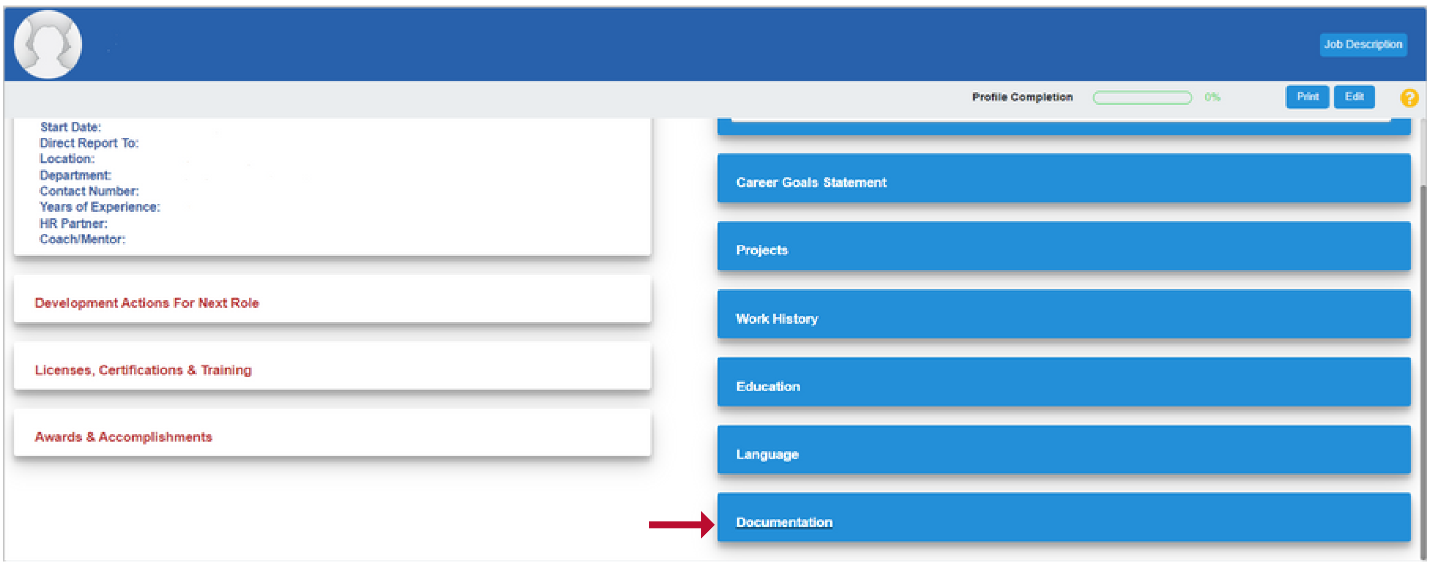
1. To add documents to your profile, on your home dashboard select **My Profile.** Then, select the *edit* button.



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

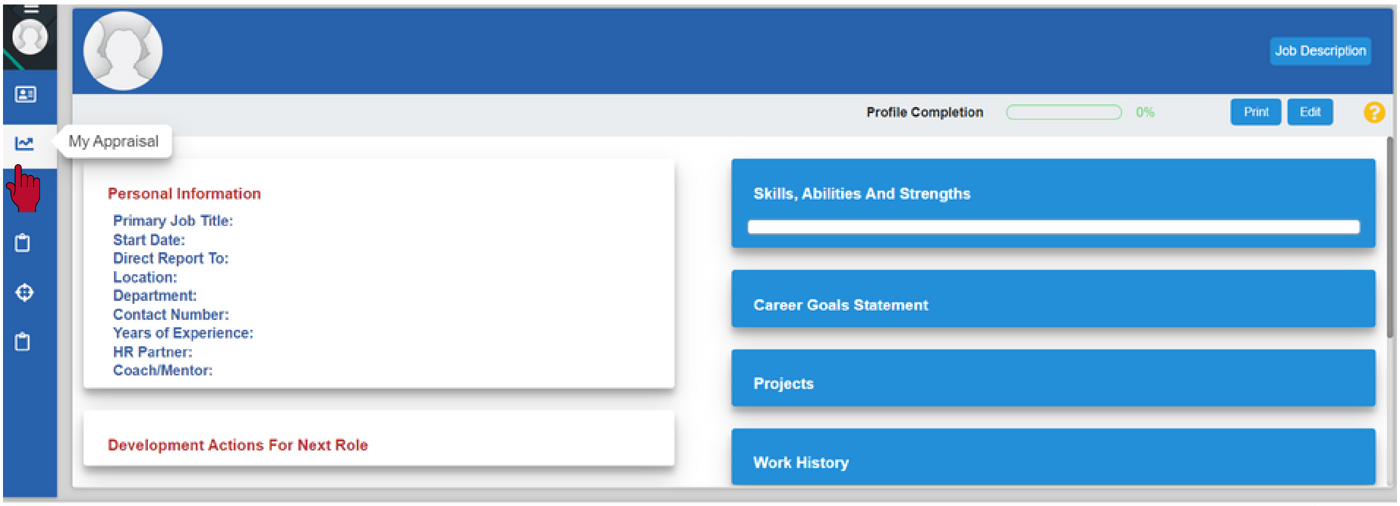


3. Now on your profile, the documentation link will be visible to your direct manager and manager level ups of your direct manager. Peers are not able to view your profile.

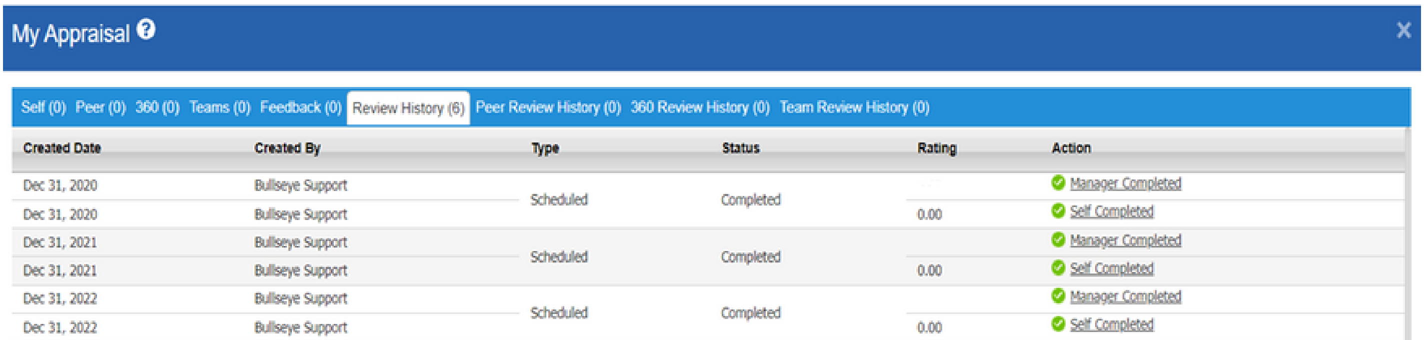


Historical Documents:

1. If you would like to view your previous evaluation(s), on your dashboard select **My Appraisal**.



2. Go to the *Review History* section where your rating will appear along with your year-end appraisals. 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 a rating. Select *manager completed* to view your year-end appraisal or self completed to view your self review.

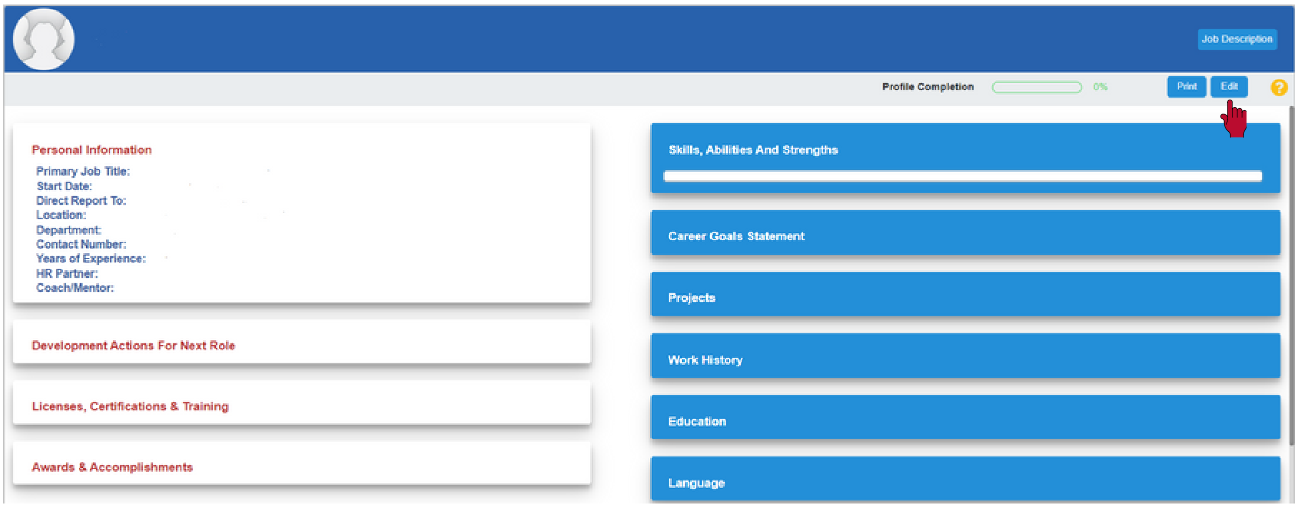

My Appraisal

Self (0) Peer (0) 360 (0) Teams (0) Feedback (0) Review History (6) Peer Review History (0) 360 Review History (0) Team Review History (0)

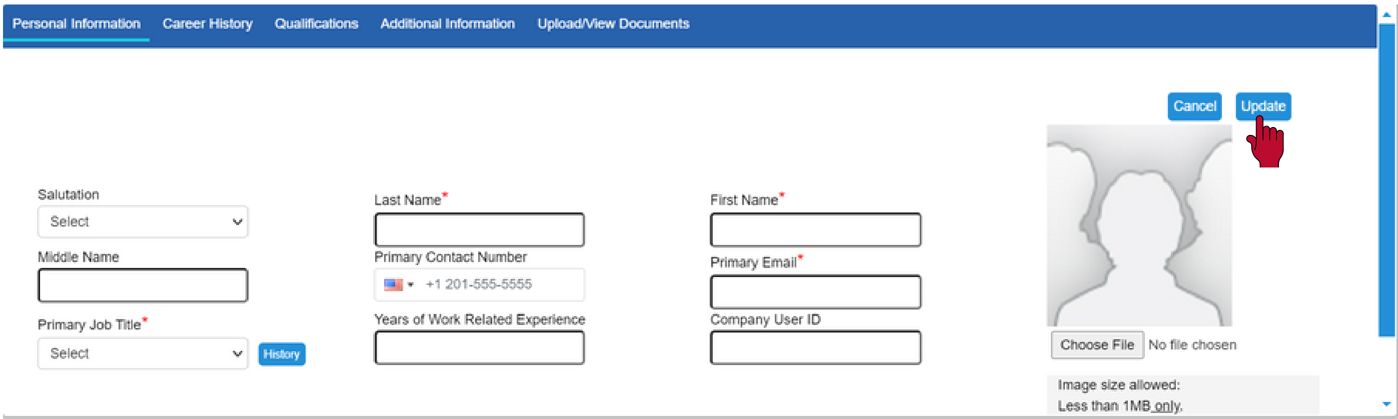
Created Date	Created By	Type	Status	Rating	Action
Dec 31, 2020	Bullseye Support	Scheduled	Completed		Manager Completed
Dec 31, 2020	Bullseye Support			0.00	Self Completed
Dec 31, 2021	Bullseye Support	Scheduled	Completed		Manager Completed
Dec 31, 2021	Bullseye Support			0.00	Self Completed
Dec 31, 2022	Bullseye Support	Scheduled	Completed		Manager Completed
Dec 31, 2022	Bullseye Support			0.00	Self Completed

Profile Page

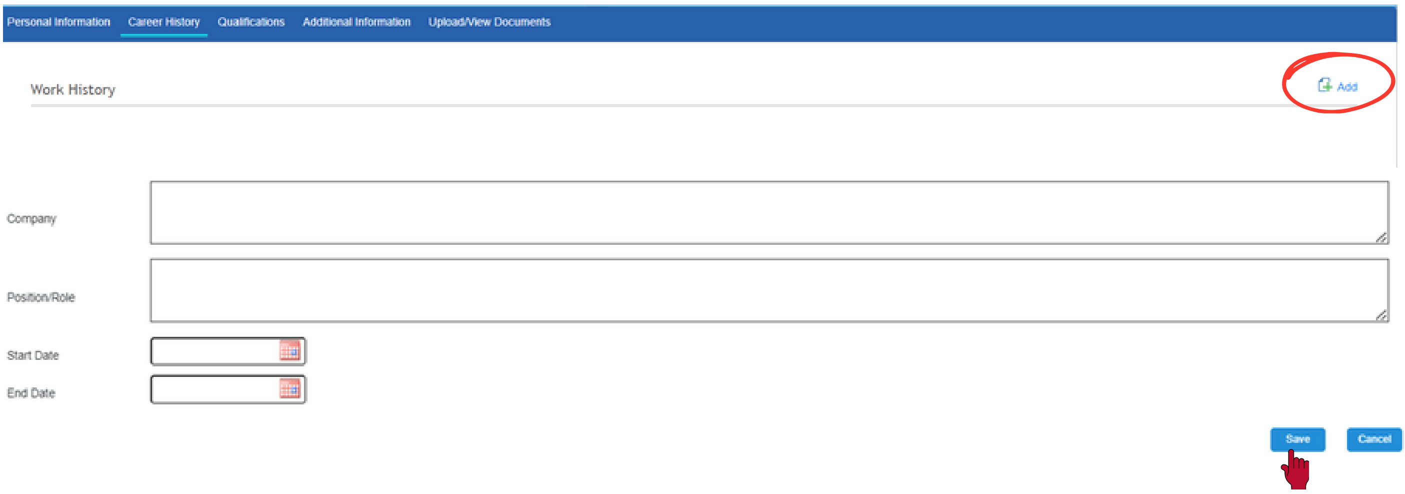
1. To edit your profile, select the *edit* button at the top of your screen.



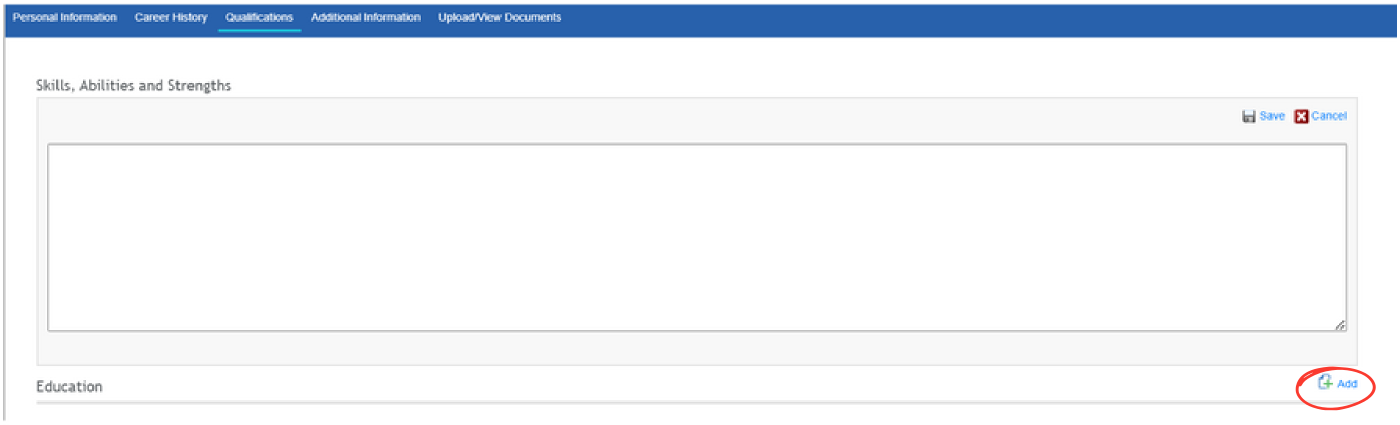
2. The information on the *personal information* tab will populate based on the information that is in the PeopleSoft system. To upload your own profile picture, select *choose file* and add your picture. Select ***update*** and your profile picture will now be visible.



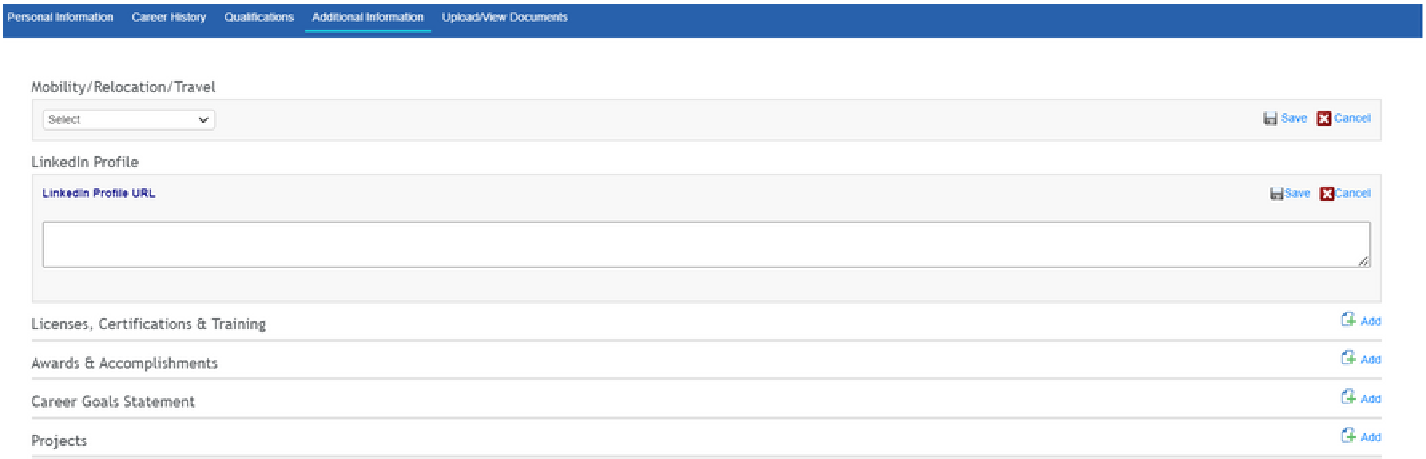
3. The *career history* tab is where you will edit your work history. Select the ***add*** icon to begin adding your information. Once completed, select ***save*** and your career history will be added. You can continue adding as much information as you would like to share.



4. The *qualifications* tab allows you to add your skills, abilities and strengths. This is also where you will be able to add your education. On education, select the ***add*** icon to add your education. Select ***save*** once completed.



5. The *additional information* tab allows you to provide your LinkedIn profile, awards, certifications and etc. Continue to select the ***add*** icon to add information you would like to share. ***Save*** once complete.



6. The *upload/view documents* tab allows you to add, or view, documents you have added to your profile page. Refer to page 32 to view uploading steps.