Performance Evaluation

Notes, Tips, and Reminders

EMORY LIBRARIES & INFORMATION TECHNOLOGY

Important Notes, Tips, or Reminders:

- **Creating a Performance Evaluation:** If you are a manager, please note that **your employees cannot begin working on their self-evaluation until you "create" the performance document in PeopleSoft HR**. To create a performance document for each of your direct reports, log into PeopleSoft HR using your normal system user ID and password, select "Manager Self Service," then "Performance Management," then "Create Documents."

- **Completing a Self-Evaluation:** Once your manager has created your performance document in PeopleSoft HR, you should receive an e-mail that will direct you to complete your self-evaluation with a link to the PeopleSoft HR login page. Log into PeopleSoft HR using your normal system user ID and password, select "Self Service," then "Performance Management," then "Current Documents."

Utilizing Each Section of the Evaluation:

- **Competencies:** In 2014, all staff are to be evaluated on the 8 core competencies defined in the new Emory performance evaluation. Please utilize the comment section under each competency to capture key accomplishments and observable behaviors. Also, do NOT limit yourself to the broad competency definitions provided in the tool as it will be necessary to interpret each competency based on the specific requirements or responsibilities of the job and employee being evaluated.

- **Goals:** Most employees will also have specific goals or objectives that have been defined for the 2014 performance cycle (please confirm with your manager). In order to capture these goals and achievements, it will be necessary to select "Add Goal" in the "Employee Goals" section of the performance evaluation or self-evaluation. Please note that when a manager adds a goal to the evaluation, that goal will not automatically be displayed on their employee's self-evaluation or vice versa. The tool does not currently have the functionality to cross-populate data on corresponding forms. Therefore, both managers and employees will have to "add" any agreed-upon goals to their respective forms to ensure alignment.

- **Attachments:** If you have detailed project or goal-tracking documents, examples of work product or customer feedback, or need to submit the Librarian Review Template, you can attach these additional items to the evaluation or self-evaluation document. Simply utilize the "Add Attachment" link toward the bottom of the performance evaluation or self-evaluation. For those of you who are librarians, I have attached a copy of the Librarian Review Template document you will use to capture the campus service, scholarly activities, and professional development necessary for the peer review process. Please complete and attach this document to your self-appraisal, even if you are not going through a peer review this year. If you are not a librarian, you do not need to complete and attach this document.

- **Navigating the Performance Evaluation Tool in PeopleSoft HR:** Step-by-step user guides for both managers and non-managers can be found at the performance management website under "Tools and Resources"**:** **http://www.hr.emory.edu/eu/performancemanagement/performance.html.** Many additional tools and reference documents that you may find helpful in completing the performance evaluation process can be found at this same site including competency definitions, behavioral examples, performance rating definitions, performance logs, and development planning forms.

- **Final Ratings:** Managers, please keep in mind that the tool will automatically calculate an overall rating based on the un-weighted average of the individually-rated competencies. However, please use the "Final Rating" feature, as necessary, to assign the overall rating that is most appropriate given individual competency weighting and goal attainment.

"Saving" Entries vs. Making Document "Available for Review":

- **Self-Evaluation**: You can "Save" entries as you make them in the self-evaluation form so that you can retrieve your work and update it prior to submission. However, once you have fully completed your self-evaluation, select "Complete" as this will notify your manager that a completed self-evaluation is now ready for their consideration. **Please ensure all self-evaluations are "Complete" by next Friday, May 23rd**.

- **Manager Evaluation:** Once the manager has reviewed the self-evaluation of each direct report, he/she will then submit into the online tool a draft performance review and overall rating. At this point in the process, the manager must select **"Save"** for each evaluation. **NOTE: there is another button that indicates "Available For Review". The manager should not click this button until they receive approval from LITS HR as it will make the review available to be viewed by their employee.** However, please "Save" all entries by the manager evaluation deadline of June 13.

- **Conducting Performance Discussions:** Please do not hold official year-end performance discussions until managers have received notification that all evaluations and ratings have been approved. This notification should be provided no later than July 23rd. However, once you are authorized to begin holding performance review discussions, all meetings should be complete by Aug 8th, before year-end compensation actions are finalized.

- **Storage and Retrieval of Historical Evaluations:** Although we will be able to reference all current and future evaluations in PeopleSoft HR, the new tool will not house historical evaluations that were created prior to 2014. Therefore, LITS Human Resources will retain historical evaluations in employee files. We already have most historical MS Word evaluations on file and will be retrieving all historical documents from Sonar6 over the next few weeks. Therefore, if you need to access a prior year evaluation and don't already possess a copy, you can request one via LITS Human Resources.

- **Employee Training:** LITS HR has conducted a total of 12 in-person performance management training sessions for both manager and non-manager audiences, and many training sessions have been offered via the Learning and Development department as well. However, the computer-based training that was under development has not yet been deployed and we may reach certain deadlines in our timeline before it becomes available. Therefore, if you were unable to attend any of the classroom sessions offered by LITS HR or Central HR, please feel free to contact any member of the LITS HR staff with questions about the new tool or process.