



## **e-Appraisal Reference Guide:**

e-Appraisal is an automated performance appraisal system that enables employees to write self-appraisals, allows managers to write performance appraisals, get input from others such as committee members, as well as set goals for the next performance year.

This guide walks you through some steps within the e-Appraisal process.

# e-Appraisal Steps

- Manager Launches e-Appraisal process
- Employee writes self-appraisal –(determined by manager)
- Manager begins writing appraisal
- Manager requests third party feedback (optional)
- Manager completes appraisal
- Second Level Manager approves appraisal
- Third Level Manager approves appraisal
- Manager meets with employee
- Employee signs off on appraisal – form becomes PDF
- Manager signs off on appraisal
- Completed document becomes part of employee record

## OVERALL STEPS

Task	Participant(s)	Notes
<i>Manager launches and writes employee appraisals</i>	<i>Manager</i>	<i>The manager may select the option to have the employee complete a self- appraisal. If so, the manager launches that process. In addition, the manager launches and writes the appraisal.</i>
<i>Employee writes self-appraisal (determined by manager)</i>	<i>Employee</i>	<i>This is an opportunity for the employee to reflect and report on their past performance.</i>
<i>Manager requests third party feedback. (optional)</i>	<i>Manager</i>	<i>Manager may request third party feedback from a committee chair or a prior manager in order to obtain additional information about the employee’s performance.</i>
<i>Second level manager approves appraisals</i>	<i>Second level manager</i>	<i>Second level manager approves and sends appraisal to third level manager for their approval.</i>
<i>Third level manager approves appraisal</i>	<i>Third level manager</i>	<i>Third level manager approves appraisal.</i>
<i>Manager meets with employee</i>	<i>Manager</i>	<i>Manager and employee meet to review and discuss the appraisal and add final comments.</i>
<i>Employee signs off</i>	<i>Employee</i>	<i>Employee reviews and signs off on the appraisal.</i>
<i>Manager signs off</i>	<i>Manager</i>	<i>Manager signs off on the appraisal.</i>

## Access the e-Appraisal System:

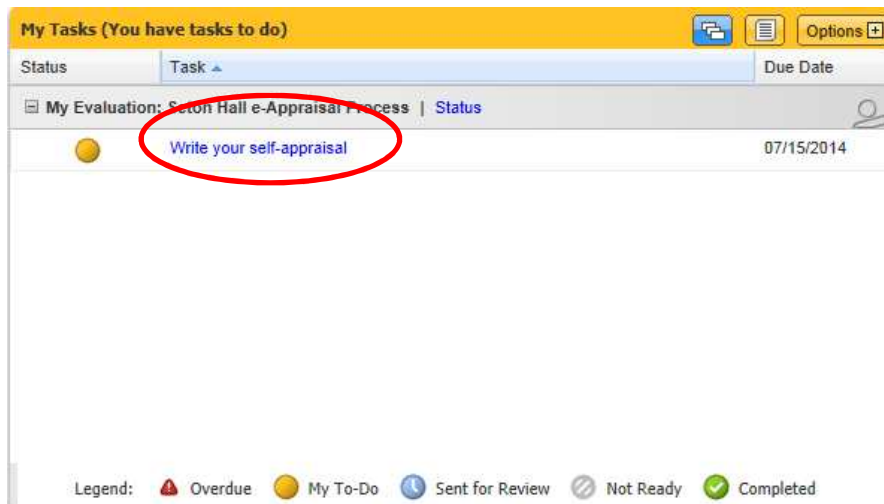
- Log into PirateNet
- Click on the Profile tab
- Go to the Human Resources section
- Click on the e-Appraisal link to log into the system
- Click on your identified task

### Employee Steps

#### **Employee Writes Self-Appraisal** – (determined by manager)

You will receive an email notification indicating you have a task to complete.

1. In the e-Appraisal system, select the task, **WRITE YOUR SELF-APPRAISAL**.



2. Document your accomplishments and performance using the Self-Appraisal. Click **COMPLETE** when you are finished.

#### **Employee Sign off** – Once you've met with your manager, you will be assigned a task to sign off on your appraisal.

3. In the e-Appraisal system, select the task, Add final comments and Sign off on your appraisal.
4. Add your comments and click Sign off.

## Manager Steps

You will receive an email notification to begin the appraisal process.

1. Click on the TASK **Launch and write employee appraisal**.
2. Check off the check box to select your employees.
3. Click the button **Launch Self-Appraisal**



4. Write the appraisal.


### GOALS:

Goals are set for Administrators at the beginning of a performance period. They are appraised at the end of a performance period. If goals are not set at the beginning of a performance period, the rating should be recorded as Not Applicable for goals.

Evaluating Goals and Competencies - There are five ratings.

- Exceptional (comment required)
- Exceeds Standards
- Meets Standards
- Below Standards (comment required)
- Needs improvement (comment required)

### SAMPLE PAST GOAL

Goals	Accomplishments
<p><b>Goal:</b> Expand use of Social Media</p> <p> Draft policy for Social Media that outlines the procedures and responsible parties. Submit a draft by September 15. Ensure that relevant parties have been consulted prior to submission, and concerns have been addressed.</p>	<p>Accomplishment of the goal(s) or details supporting why it was not accomplished.</p>

**COMPETENCIES:**

The rating descriptions are specific to each competency. Please select the one that best applies.

**SAMPLE COMPETENCY**

**Competencies**

**Job Knowledge/Skills**

Demonstrates job relevant knowledge and essential skills gained through experience, general education and/or specialized training.

- Exceptional** - Demonstrates superior job relevant knowledge and utilizes essential skills gained through experience, general education and/or specialized education.
- Exceeds Standards** - Demonstrates outstanding job relevant knowledge and utilizes essential skills gained through experience, general education and/or specialized education.
- Meets Standards** - Demonstrates job relevant knowledge and utilizes essential skills gained through experience, general education and/or specialized education.
- Below Standards** - Inconsistently demonstrates job relevant knowledge and utilizes essential skills gained through experience, general education and/or specialized education.
- Needs Improvement** - Does not demonstrate job relevant knowledge and utilize essential skills gained through experience, general education and/or specialized education.

Comments:




 [Attach Feedback](#)


**TOOLS:**

The e-Appraisal system provides useful tools to assist you in writing comments and providing coaching tips.



A.  Using the Comment Helper and Coaching Tips tools. This button will launch a tool with suggested comments. The comments can be adjusted by a scale to reflect your evaluation.



B.  This button will check for spelling mistakes in the comments.

**GENERAL RATING:**

Based on the ratings you provide for the goals and the competencies, an overall system-generated rating is provided.

**General Ratings:**

**Exceptional:** Consistently produces superior work that advances the team and university; continuously seeks to improve self, team, and processes; is a resource/role model for others.

**Exceeds Standards:** Frequently exceeds requirements; is highly motivated, takes initiative; demonstrates creativity and produces a quality work product.

**Meets Standards:** Completes tasks according to requirements and in a satisfactory manner.

**Below Standards:** Performance does not meet standards. Further improvement is required. Performance Improvement Plan required.

**Needs Improvement:** Fails to meet requirements of job. Immediate improvement needed to remain employed. Performance Improvement Plan required.

**Overall Score**

**Rating:** Exceeds Standards

**A Development Plan / Improvement Plan:**

This Plan is instrumental in aiding employees to acquire new skills as well as improve upon their current skills. Plans can include opportunities to improve in areas such as communication skills, technical skills, or job-specific skills.


**Development/Improvement Plan Instructions**

The development plan (for enrichment) or improvement plan (for a 30 to 90 day performance improvement plan) is designed to enable the employee to focus on areas for improvement, development or enrichment.

**Development/Improvement Plan**

Development Objectives

Title:

Due:  



 [Attach Feedback](#)

 [Add Development/Improvement Plan](#)



## TOOLBAR:

- A. Save: If you need to stop working prior to completing the appraisal select the **Save** button to save your work thus far. You will be able to return later to complete the appraisal.
- B. Send for Review: Send for review (third party) - optional

You might choose to send an appraisal to a third party for their input in the case of committee work or a change in one's supervisor during the performance period.

Note: The third party reviewer will be able to see all data contained on the appraisal.

- C. Complete: Complete the appraisal – this will send appraisal to next approval level.



## Approver Steps

1. Click on the task **APPROVE APPRAISAL** for second or third level reports.  
If desired, make annotations and send back to author/immediate supervisor or Approve.
2. Once complete, hit APPROVE and the appraisal will move on to the next step in the process.

## **Frequently Asked Questions:**

### ***How will I know if I have a task to complete?***

You will receive an email notifying you that you have at least one task to complete.






### ***How do I start a task?***

To start a task, click the title of the step name to open the task.



## ***What do the icons next to my tasks mean?***

The icons that appear next to your tasks indicate the status of your task:

	Tasks that need your attention but are not yet past due
	Tasks that are past due and should be prioritized
	Tasks that have been completed and no longer require your attention
	Tasks that are being reviewed
	Tasks that are not ready for you to complete

## ***How do I save my work so far so that I can complete it later?***

If you need to stop working prior to completing the appraisal select the **Save** button to save your work thus far. You will be able to return later to complete the appraisal. When writing an appraisal you should only select the **Complete** button once you have finished working on the appraisal.



## ***What do I do if I hit "Complete" by mistake before I have finished writing my appraisal?***

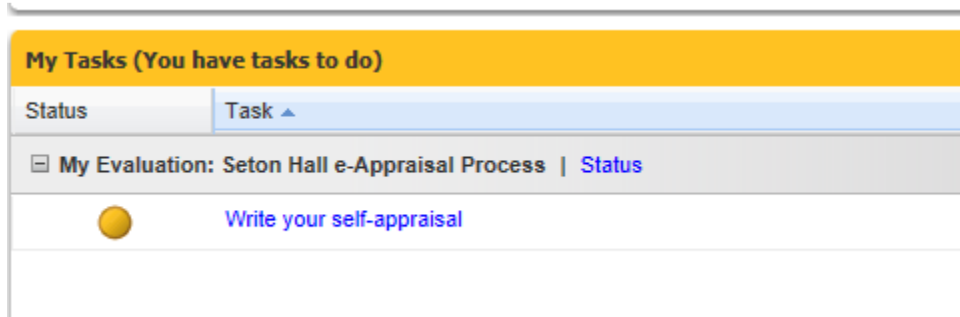
If you select the **COMPLETE** button before you are finished working with an appraisal you should contact Human Resources- [humanres@shu.edu](mailto:humanres@shu.edu). They will be able to reset the status of the appraisal so that you can access and complete it.

## ***How can I view the Status of my Appraisal?***

To View the Status of Your Appraisal Process:



1. From the Home page, in the My Tasks area, select the **STATUS** link next to the Appraisal Process title.



An Individual Status report window appears displaying the Appraisal process steps, their Due Dates and the Person Responsible:

Status for My Evaluation - Seton Hall e-Appraisal Process			
Step	Status	Due Date	Person Responsible
Employee writes self-appraisal		07/15/2014	Haley halogenEmployee
Manager launches and writes employee appraisals		07/15/2014	Hal halogenManager
Second level manager approves appraisals		07/15/2014	Henrietta halogenSecondlevel
VP approves appraisals		07/15/2014	N/A
Manager meets with employee and adds final comments		07/15/2014	Hal halogenManager
Employee sign-off		07/15/2014	Haley halogenEmployee
Manager sign-off		07/15/2014	Hal halogenManager
Third party feedback		07/15/2014	N/A

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