PERFORMANCE MODULE

USER GUIDE
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Welcome to BaylorCompass

This section introduces BaylorCompass, the online career management system available to all faculty and staff of Baylor with anytime, anywhere access.

To access BaylorCompass, go www.baylor.edu/compass.

For additional instructions and FAQs, go to www.baylor.edu/hr/baylorcompass.
Navigating in BaylorCompass

This section provides a quick look at the ‘Home’ screen.

Log in to BaylorCompass: **www.baylor.edu/compass**

*TIP:*

Bookmark BaylorCompass after logging in, and rename your bookmark/favorite so you'll remember it!

![Add a Favorite](image1)

The BaylorCompass 'Home' screen

![BaylorCompass Home Screen](image2)
**Profile:** A brief summary including the name of your supervisor and HR Client Relationship Manager

![Profile Image](image)

**My Tasks:** A list of Learning or other tasks currently to be completed in the system

![My Tasks Image](image)

**Activity Tracker:**

A list of your recent activity; modify what is displayed by clicking the wrench icon tab, OR hide the tracker by clicking the right arrow in the upper-left. Group by date or type.

![Activity Tracker Image](image)
The BaylorCompass ‘My Performance' screen

Profile: Includes your title, email address, supervisor, and department

Goals: As part of your appraisal, goals for the upcoming year will be created and recorded here. Throughout the year, you can view the goals here, track their progress, make notes, etc.
Development Plans > Learning Activities: View your current and past learning activities here.

More information about how you can use the Development Plans function, below, will be coming in the next few months.

Evaluations: Upon completion and sign off of your appraisal, a PDF of the form will be saved here. This tab will display performance appraisal records after the Performance module of BaylorCompass is released this spring, and staff have completed their first online performance appraisal.
Completing a Performance Self-Appraisal: Employee

This section provides an overview of completing a performance self-appraisal for employees.

Complete the self-appraisal:

1. Under My Tasks on the Home page, click on Write your self-appraisal
2. Complete the Annual Performance Appraisal form
   - You may copy & paste from a Word document if you used it as a tool to prepare.
   - You may Save your work and return to it multiple times.
3. Once finished, you must click on Complete.
   *Note: Clicking Complete locks your response areas and sends the form to your manager. Once you click Complete, you no longer have access to edit the document.*
4. The form is sent to your manager through BaylorCompass for their comments. Once your manager completes their response, then they will schedule a meeting with you for the performance conversation.
Acknowledged Receipt of Appraisal:

1. Following the conversation, your manager will send the form to you and you will have a task for Sign off your appraisal.
2. Click Sign off your appraisal under My Tasks.
3. Enter the date of the conversation meeting.
4. Choose an acknowledgement statement.
5. Click Sign off.

NOTE: If the second acknowledgement is chosen, then this process progresses and an addendum is begun. The addendum allows for employee and manager comments in coordination with the HR Client Relationship Manager.
Completing a Performance Appraisal: Manager

This section provides an overview of completing a performance appraisal for managers.

Complete the appraisal:

1. Under My Tasks, click on Write appraisal for your direct reports

   Task Status screen
   - This tab shows tasks in the performance appraisal process so that you can track your employees’ appraisal through the process
   - The highlighted section shows the current status and the blue-text shows the sections that require action from you.

2. Click on Edit Appraisal
3. Complete the **Annual Performance Appraisal** form

- You may copy & paste from a Word document if you used it as a tool to prepare.
- You may copy, paste, and edit from the Employee Response area, as well.
- You may **Save** your work and return to it multiple times.
4. Pay special attention to the **Goals** section

- The employee’s response in this section is a suggestion.
- You, the manager, must input information into the Goals section for it to feed into the Goals tab of the employee’s performance area and be available for tracking progress throughout the year.
- You may copy, paste, and edit from the Employee Response area, if you agree with the goals written by the employee.
- Due dates and weights are optional.
5. Select the **Overall Performance Indicator for the Past Year**
   - You can view the employee’s self rating for input and awareness.
   - The rating you select for the employee will inform the merit compensation process.

6. Disregard the **Employee Acknowledgement of Receipt** - This area is viewable to you, but will be completed by the employee at the end of the process. You will see the completed section upon sign-off.
Send for Review

- This function allows you to send the evaluation to others for input.
- Purpose: To obtain review of your (manager) comments
- The reviewer can add annotations, but cannot edit the content.
- If you choose to include information from the annotations in your comments, you may note from whom those comments came if it provides context.

7. Once you have completed the form, click **Complete**.

   **Note:** Clicking Complete locks your response areas and sends the form to the second-level manager. Once you click Complete, you no longer have access to edit the document unless the second-level manager returns it with annotations for inclusion in the comments.
Reviewing a Performance Appraisal: Second-Level Manager

This section provides an overview of reviewing and approving a performance appraisal for second-level managers.

Review the appraisal:

1. Under My Tasks, click on Second level manager reviews appraisal
2. Send Back to Author - Second-level managers cannot directly edit the content of the appraisal. They can make annotations and Send Back to Author (direct manager).
   - Annotations are available only for the direct manager to view. They are not recorded in the final document and are not viewable by the employee. Think of them as post-it notes for the reviewer and manager.
   - If the second-level manager chooses to Send Back to Author, then the form is sent to the direct manager and unlocked for edits, who may amend comments before clicking Complete again.
Approve the appraisal:

If the direct manager’s comments and rating are acceptable, then click **Approve**.

*Note: This locks the form and sends it to the next step in the process.*

- If the performance indicator rating is Meets, Exceeds, or Significantly Exceeds Expectations, then the next step is the **Manager meets with employee to discuss review**
- If the performance indicator rating is Partially Meets or Does Not Meet Expectations, the form is sent to the HR Client Relationship Manager for review and approval.
Conducting a Performance Conversation: Manager

This section provides an overview of scheduling, conducting, and recording the completion of a performance conversation. For more information on preparation and techniques for conducting the performance conversation, please see the Performance Management Guide or contact your HR Client Relationship Manager.

Discuss the appraisal:

1. Under My Tasks, click on Manager meets with employee to discuss review
2. Click on View Appraisal
3. Click on Show as PDF and save document
4. Send an Outlook Meeting Request to employee for performance conversation and attach document to request
5. Close window – Do not complete at this time!

Annual Performance Appraisal
6. Conduct the performance conversation.

7. Following the performance conversation, log in to BaylorCompass and return to Manager meets with employee to discuss review.

8. Click on Mark as Completed, and click OK.

9. The form is sent to the employee for acknowledgement of receipt.
   - The employee will enter the date of the performance conversation and select an acknowledgement. **NOTE: If the second acknowledgement is chosen, then this process progresses and an addendum is begun. The addendum allows for employee and manager comments in coordination with the HR Client Relationship Manager.**
   - The employee then clicks Sign Off. This returns the form to you, the manager.
Signing Off on the Appraisal: Manager

This section provides instructions on signing off on the appraisal, which closes the process.

Sign Off on the appraisal:

1. Click on **Sign-off appraisals for direct reports**

2. Click on **View Appraisal** to view the employee’s acknowledgement selection

3. Click on **Sign Off**

   ![Appraisal Image]

4. The process is complete.
   - A PDF of the form is housed in the employee’s My Performance > Evaluations section of BaylorCompass.
   - As a manager, you can view the appraisal by clicking on My Employees, finding the employee’s record and clicking on the number under the Evaluations column.