Overview

The staff performance appraisal process is done in Ignite. The overall process and evaluation form is similar to years’ prior. This document will guide you through the overall process, highlighting areas that benefit from additional instruction or detail.

Please Read

Notes

- This document includes a one-page summary of the process that includes enough information to get you started. Additional and more detailed process information follows in the “Completing the Evaluation Process” and “Viewing Process Progress of Direct and Indirect Reports” sections.

- The final section provides information about viewing the progress of your direct and, if applicable, indirect reports. This information will help ensure your team meets all of the deadlines.

- Some departments, such as the Police Department, use a modified or different evaluation. While some of the details may be different, the mechanics are the same.

Important Things to Know

- The Ratings Summary section is at the top of the document instead of at the end, but still serves as a spot for overall comments and information not included elsewhere including significant successes and setbacks, final comments, and future development recommendations.

- If employees entered their goals in Ignite, they will be included on the document. Please, remind your employees to update their goals in Ignite before starting their self-evaluation (you will need to approve any updates). If the employee does not have current goals in Ignite, the review can be done without them.

- Future goals will be added to Ignite in a separate process that will begin later in the year (more information to come).

- Submitting the evaluation does not give the employee access. It must be shared with a separate action in Ignite.

- Both your and the employee must sign off in Ignite to indicate that the performance discussion meeting took place. However, the manager must sign off first before the employee will be able to.
Staff Performance Appraisals:
Completing and Viewing Staff Evaluations as a Manager

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READ FIRST

This is a brief overview of navigation and process for evaluations. More details are available in the later sections. NOTE: information on viewing where employees are in the process is available in the more detailed sections below.

One Page Summary on Evaluations

Evaluation Process (Manager steps are in yellow and are shown below)

1. Employee completes and submits self-valuation.
2. Manager completes the evaluation.
3. Manager shares completed evaluation with the employee and they meet to discuss.
4. Manager indicates performance review meeting was held.
5. Employee confirms performance review meeting was held.

Navigation to Evaluation

There are two ways to navigate to the review document:

1. My Team > Career and Performance > Evaluate Performance > 2021-22 Staff Performance Review
2. My Team > Career and Performance > Select Employee’s Name > 2021-22 Staff Performance Review

Completing the Evaluation

1. The document has several sections. Each section is completed separately and accessed through the Edit or Evaluate buttons.
   - Ratings Summary: This section shows the overall calculated rating from the other sections AND includes a comment section for you to complete. Provide a brief overview of the employee’s overall performance including notable successes and challenges worth highlighting, especially ones not mentioned in other sections, as well as areas of strength and development for future career growth.
   - Core Commitments: This section uses both a drop-down ratings scale as well as a comments box for each of the six core commitments. Ratings are required and comments providing detail and context for the rating are recommended. Additionally, managers are expected to add comments if the highest or lowest ratings are selected.
   - Job Performance: This section also uses a rating scale and comment box.
   - Performance Goals: If the employee has entered performance goals in Ignite for the past year they will be included here. There is a comment section, but no rating. If the employee has not entered goals, there is no need to complete this section.
   - Attachments: If for any reason you have additional documents you want to include with the employee’s evaluation, they can be added here.

2. When finished click Submit on the same page to submit the evaluation. Additionally, you can view, print, or save the document as PDF using the Print button.

Sharing the Evaluation with the Employee

1. Navigate to evaluation and open as described above. Click the Share and Release button, then Submit.

Indicating the Performance Discussion was Held

1. Navigate to evaluation and open as described above. Click the Indicate Meeting Held button, then enter the Meeting Held Date, and Submit. The employee also needs to confirm the meeting was held but cannot do so until after you have first indicated the meeting was held.
Completing the Evaluation Process

Managers should receive a bell notification indicating the employee has completed their self-evaluation. Once the employee has completed their self-evaluation, you can begin and submit your review of the employee.

I. Navigating to and Opening the Evaluation

1. You can access the Complete Manager Evaluation task by selecting the Career and Performance tile under the My Team tab on the Ignite home page.
2. On the Goals and Performance Overview page select **Evaluate Performance** on the left side of the screen. This will filter out those who don’t have a review, such as new or temporary employees, student workers, etc.
3. In the Performance Documents section, select the **2021-22 Staff Performance Rev** link to open the evaluation. You will only initially see detailed information for the first employee listed. To view details on the other employees, expand their section with the down arrow.

NOTE: you can see what stage each employee’s review is at and the related due dates. An arrow indicates the current step and a check mark indicates the step is complete. For example:

```
2021-22 Staff Performance Rev
Tester_Baylor_s48
Assistant Director, Marketing Communications

<table>
<thead>
<tr>
<th>Current Task</th>
<th>Task Completion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conduct Manager Evaluation</td>
<td>Due 04/13/2022</td>
</tr>
</tbody>
</table>

Manager Rating
Not Rated Yet

Employee Rating
Area of Competence
```

All Tasks
- ✔ Employee Completes Self-Evaluation | Due 03/21/2022
- ✔ Conduct Manager Evaluation | Due 04/13/2022
- ✔ Share Performance Document with Employee
- ✔ Confirm Review Meeting Held | Due 04/29/2022
- ✔ Confirm Review Meeting Held | Due 04/29/2022
2. Completing a Manager Evaluation of the Employee

1. After opening the evaluation, you will see several sections, including an overall Ratings Summary, Core Commitments, Job Performance, and Performance Goals (if applicable). NOTE: the Documents Details section an administrative summary and is not used for the evaluation.

To enter ratings or comments you must select **Edit** or **Evaluate** for each section. **NOTE:** even though the Ratings Summary is at the top, you may want to complete it last.
2. When clicking **Evaluate** you will be able to select a rating by using the drop-down menu. You can select a rating from the following options: **Area of Concern**, **Area of Needed Development**, **Area of Competence**, and **Area of Mastery**. You can also enter comments by typing in the box labeled “Manager Comments.” While it’s always helpful to add comments, you are **REQUIRED** to add comments if you use either the Area of Concern or Area of Mastery ratings. Follow all of these steps for each evaluation topic category.

Rate and Comment

![Rate and Comment Section]

3. After evaluating the Core Commitment section, evaluate the Job Performance section the same way. If the employee has Performance Goals, there is not a rating given but you can comment in that section. When you are finished evaluating your direct report, an overall rating will be automatically calculated in the top of the screen in the “Ratings Summary” section. Select **Edit** to add final comments and an overall summary of their performance.

![Ratings Summary Section]
4. Write final comments and an overall summary of their performance for the year and additional comments for items not addressed elsewhere on the form, including areas of strength and areas of development for future career growth. Select **Save** when you are finished. After saving, you can return to the document to edit or add additional information.

5. When finished, click **Submit** in the upper right-hand corner of the screen to submit your direct report’s evaluation. **Once submitted, you will not be able to make any additional changes. Additionally, even though it is submitted, the employee will not see the review until you share it** (described in the next section).

   Note: selecting **Print** prior to submitting will allow you to print or save the document as a PDF.

   Note: if you did not add comments to one or more of the sections, you will get a warning message like the one below. If you select **No**, the document will not be submitted and you can make changes. If you select **Yes**, the document will finish submitting.
3. Sharing and Releasing a Manager Evaluation

1. Use the steps listed in Section 1 to navigate to the employee’s performance review. [My Teams > Career and Performance > Evaluate Performance] Next, open the performance evaluation by selecting the **2021-22 Staff Performance Rev** link.
2. In the upper right of the screen, click **Share and Release** to share the evaluation for employee review. This will give the employee access to the performance review.

3. After clicking Share and Release, you will see a screen with **Submit** and **Cancel**. Simply select **Submit** to release the evaluation to the employee.
4. **Indicating the Performance Discussion Was Held**

4. After sharing and releasing your employee's evaluation you will need to have a meeting with the employee to discuss the evaluation. To indicate that a meeting was held between you and your direct report, use the steps listed in Section 1 to navigate to the employee's performance review. [My Teams > Career and Performance > Evaluate Performance] Next, open the performance evaluation by selecting the **2021-22 Staff Performance Rev** link.

1. On the right side of the screen, click **Indicate Meeting Held**.

2. **Indicate Meeting Held**
3. Next, click the **Calendar** icon to enter the date when you had the meeting with your direct report and then **Submit**

4. You have now completed all of your steps. Your employee will now be able to confirm the meeting was held in Ignite in order to finalize the process. Please let them know it is ready for them to confirm in Ignite.
Viewing Process Progress of Direct and Indirect Reports

Managers can view the individual progress of their employees in the performance appraisal process from the regular Career and Performance tile. Additionally, Ignite has dashboards that allow managers and senior leaders to easily view performance review completion and ratings for all those who report up to them. This dashboard is most useful for those who manage multiple levels.

I. Viewing Individual Progress

1. From the My Team tab on the main Ignite page, selecting Career and Performance opens up the Goal and Performance Overview page.
2. **Select Evaluate Performance** from the options on the left side of the screen.
3. The Evaluate Performance screen lets you see where each direct report is at in the process. In this example Testuser_Baylor_s46 has completed their self-evaluation (checkmark) and it is at the Conduct Manager Evaluation stage (arrow). NOTE: you will only initially see detailed information for the first employee listed. To view details on the other employees, expand their section with the down arrow.
Additionally, if you can’t find an employee on this page whose review you already completed, scroll down and clear the **Document Status** filter at the bottom. This filter defaults to showing only the reviews that have not yet been completed. Clearing or changing it to another status will let you see completed reviews on this page.
2. Use Dashboard to View Process Progress and Information for Multiple Levels
   This example uses a dean and then three employees going three levels below the leader, each with a performance review. The process is the same for both faculty and staff. This is a highly simplified example from a test environment and the titles, etc. may not reflect an actual school or department structure, but the mechanics are the same.

1. Select the **My Team** tab and then **Show More**.
2. Scroll down, if necessary, and select **My Organization** under the **Career and Performance** section (note: this is different from the Career and Performance tile on the main page).

This will open up a dashboard with multiple options.
4. The **My Organization** dashboard has several tabs and viewing options. There is a filter that changes whether only direct reports or the entire department are viewed. The example shows the senior leader's direct report who received a Marginal rating. Clicking on the funnel to the left of the name lets you change the levels viewed.
5. Clicking on the funnel opens a pop up that enables changing between direct reports only and all reports as well as changing the manager to view only that person’s area. So, for example, a dean could view all of their school at once or view reviews in one chair’s area. After changing the filter options, select **Apply**.
6. In this example, with the filter set to all reports, the **Ratings Distribution** tab shows there are three reviews completed for all of their reports, with two rated as Noteworthy and one rated as Marginal.

7. Selecting the **My Organization Performance Summary** tab allows seeing the ratings for each individual. This example shows only the direct reports. Selecting the arrow above the name shows that person’s direct reports and allows seeing deeper into the organization:
8. Now, all three levels can be seen along with the ratings at the far right. Those who have not been rated yet have a red crossed circle to the left of their name.

9. The **Task Completion Status** tab shows how many reviews have been completed and how many are still pending. In this example, all reviews have been completed. Note, the **Performance and Potential** tab is not used.