

# Staff Performance Appraisals: Completing a Self-Evaluation

## Overview

The staff performance appraisal process will be 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 are different from previous years or 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” section.
- 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.



### Key Differences from Previous Years

- The Ratings Summary section is now at the beginning of the document, 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.
- Last year, goals were done out of system and adding them to Ignite was optional. If you entered their goals into Ignite they will be included on the evaluation document. If you did not enter goals, did not have goals, or the goals changed so much over the year that they are no longer relevant, the review can be done without them. There is no need to enter new goals onto the document.
- Future goals will be added to Ignite in a separate process that will begin later in the year (more information to come).
- Both you and your manager must sign off in Ignite to indicate that the performance discussion meeting took place. The process is not finished until you have signed off. However, the manager must sign off first before you will be able to.

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# Staff Performance Appraisals: Completing a Self-Evaluation

## READ FIRST

This is a brief overview of navigation and process for evaluations. More details are available in the later sections.

### One Page Summary on Evaluations

Evaluation Process (Yellow steps shown below)

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

#### Navigation to Evaluation

1. Me > Career and Performance > Performance > 2021 Staff Annual Evaluation (*Performance Documents Section*)

#### Completing the Evaluation

1. The document has several sections. Each section is completed separately and accessed through the **Edit** or **Evaluate** buttons.
  - **Document Details:** Ignore this section. It contains administrative details about the document.
  - **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 your successes and challenges from the past year. Be sure to include important projects, assignments, significant changes to duties or responsibilities, as well as any performance or development goals. What went well? What were some of the set-backs, challenges, or unexpected circumstances which were either overcome or impacted completion?
  - **Core Commitment:** This section used both a drop down ratings scale as well as a comments box for each of the six core commitments. Ratings are required and comments are recommended. It is strongly recommended to add comments if you select the highest or lowest rating.
  - **Job Performance:** This section also uses a rating scale and comment box.
  - **Performance Goals:** If you have entered performance goals in Ignite for the past year they will be included here. There is a comment section, but no rating.
  - **Attachments:** If, for some reason, you have additional documents you want to include, they can be added here.
2. When finished you can print or save the document as PDF using the **Print** button. Click **Submit** on the same page to submit the self-evaluation to your manager.

#### Viewing Completed Document After Manager Shares

1. Navigate to evaluation as described above. You can now view, save, and print this document using the **Print** button.

#### Confirming Performance Review Meeting was Held

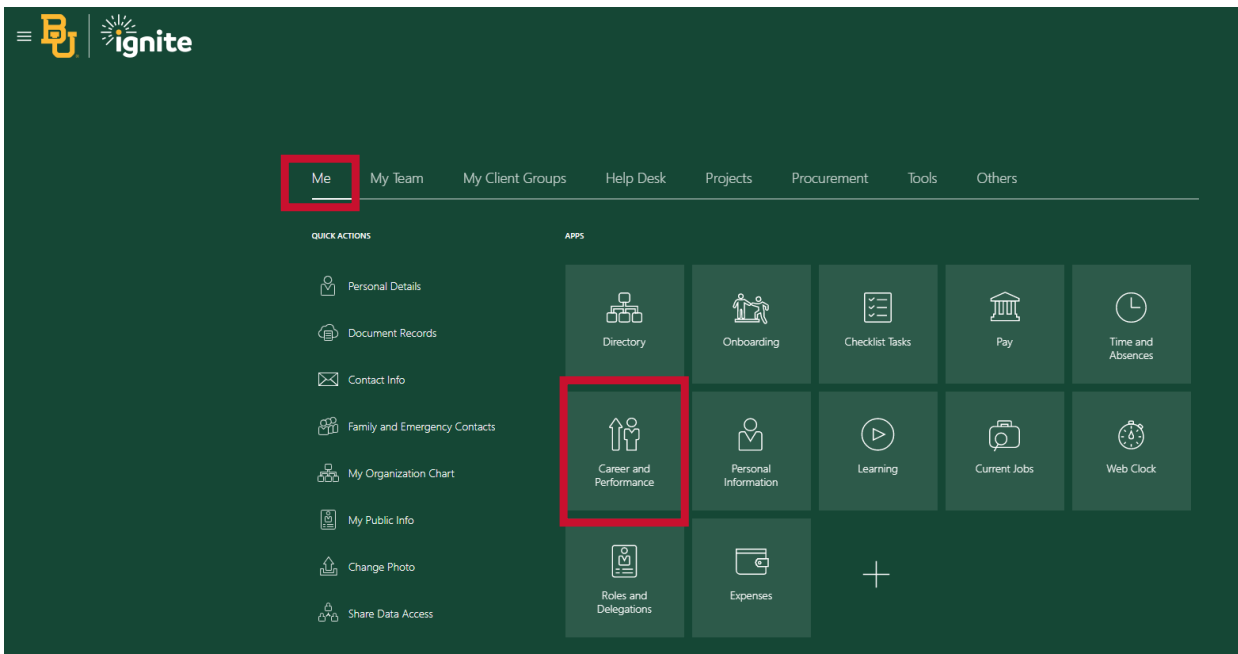
1. Navigate to evaluation as described above. Click on the **Acknowledge Meeting** button. Note, you will not be able to do this until *after* your manager has first indicated the meeting was held.

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## Completing the Evaluation Process

### I. Navigating to the Performance Module

1. You can easily access the **Self-Evaluation** using the **Me** tab on the home page and selecting the **Career and Performance** tile.



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2. Upon entering the Career and Performance tile, click the **Employee Self-Evaluation** link. Alternatively, you can also access the evaluation through the **Performance** card (see below).

Career and Performance

TE  
Testuser\_Baylor\_s48

It's time for 2021 Staff Annual Evaluation.

Current Task: Employee Self-Evaluation | Due Date: 03/12/2021

Skills and Qualifications: Build your talent profile by adding skills and qualifications.

Goals: Set and manage performance goals.

Performance: View performance documents and complete related tasks.

Career Development: View details about your development plan, career interest, and career exploration.

Feedback: View or request feedback about yourself.

After selecting the **Performance** card, select your evaluation by using the hyperlink. Note: on this screen you can also see which step the process is at and due dates.

Performance Documents

Current

2021 Staff Annual Evaluation | Testuser\_Baylor\_s36

Current Task

Employee Self-Evaluation | 03/12/2021  
Conduct Manager Evaluation | 04/01/2021

Task Completion: 0 / 5

All Tasks

- Employee Self-Evaluation | 03/12/2021
- Conduct Manager Evaluation | 04/01/2021
- Share Performance Document with Employee
- Confirm Review Meeting Held | 04/23/2021
- Confirm Review Meeting Held | 04/23/2021

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## 2. Completing a Self-Evaluation

1. The self-evaluation form has several separate sections. There is an overall Ratings Summary at the top, followed by the Core Commitments, Job Performance, and Performance Goals (if applicable). To enter ratings or comments you must select **Edit** or **Evaluate** for each section. Even though the Ratings Summary is at the top, you may want to complete it last.

**NOTE:** the Document Details is an administrative section and not used to complete the document.

The screenshot displays a web interface for a performance appraisal. At the top is a 'Document Details' section with a dropdown arrow. Below it is the 'Ratings Summary' section, which includes fields for 'Manager Rating', 'Employee Rating', 'Area of Mastery', 'Manager Comments', and 'Employee Comments'. A 'Show Additional Info' link is at the bottom of this section. To the right of the 'Ratings Summary' is a yellow 'Edit' button with a pencil icon, highlighted by a red box. Below the 'Ratings Summary' is the 'Evaluation Topics' section, which contains three rows: 'Core Commitment', 'Job Performance', and 'Performance Goals'. Each row has a yellow 'Evaluate' button to its right, all three of which are highlighted by red boxes. The 'Core Commitment' row shows '6 of 6 rated | 6 of 6 commented' and an 'Employee Calculated Rating' of 3.50. The 'Job Performance' row shows '1 of 1 rated | 1 of 1 commented' and an 'Employee Calculated Rating' of 4.00. The 'Performance Goals' row shows '0 of 0 commented'.

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- 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 “Employee Comments.” While it’s always helpful to add comments, it is *STRONGLY RECOMMENDED* 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

Evaluate the included competencies.

Account for Stewardship of Time, Resources & Self  
Discernment, Deliver Results, Plan & Organize

Employee Proficiency Level

Employee Comments

Show Additional Info

- When you have finished the section, select **Save and Close** in the upper right to go back to the main form. Once saved, you can return to the document to edit or add additional information.

Evaluate Topic Core Commitment  
Testuser\_Baylor\_s48

Save and Close Cancel

Rate and Comment

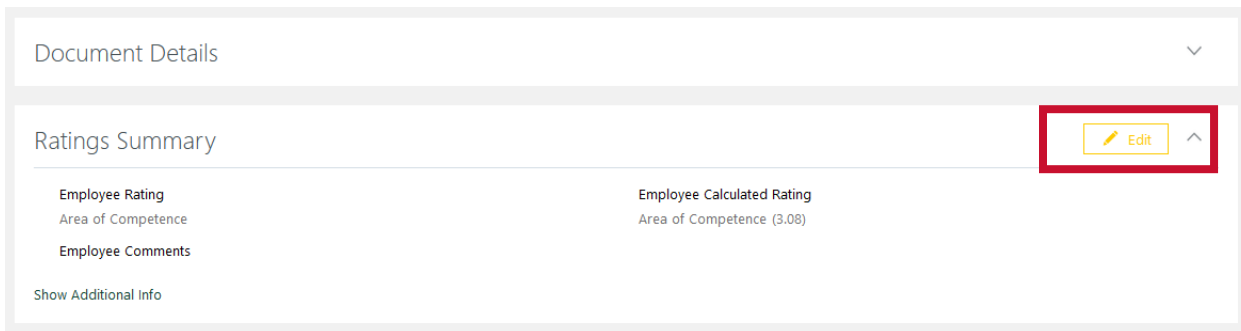
Evaluate the included competencies.

Account for Stewardship of Time, Resources & Self  
Discernment, Deliver Results, Plan & Organize

- Repeat for the **Job Performance** and **Performance Goals** (if applicable) sections. Note that the Performance Goals section does not use a rating, but you can add comments.

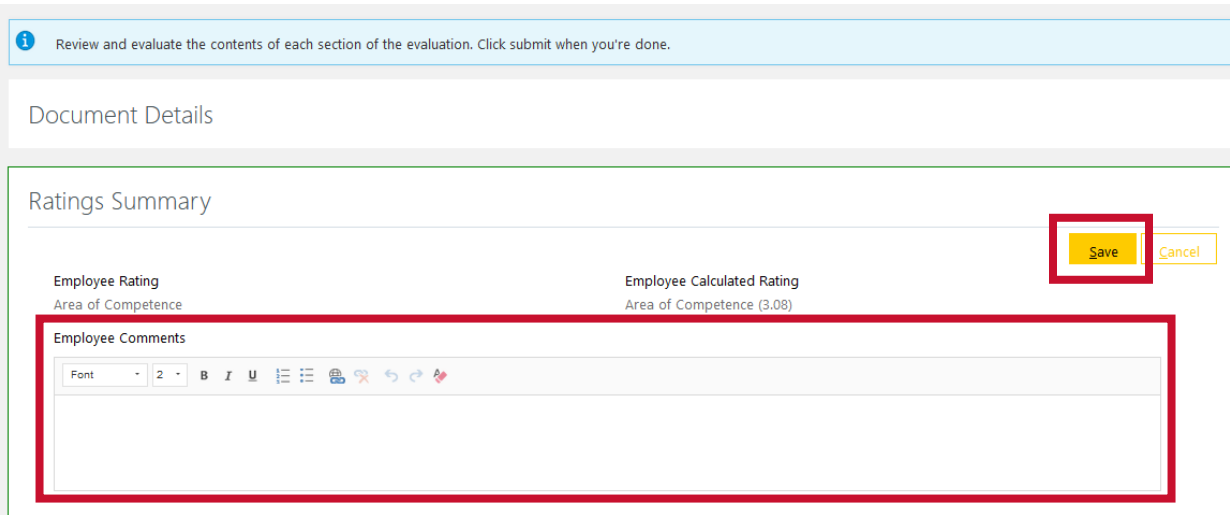
# Staff Performance Appraisals: Completing a Self-Evaluation

- When you are finished evaluating yourself, an overall rating will be automatically calculated in the top of the screen in the Ratings Summary section. Select **Edit** to open the text box.



The screenshot shows the 'Ratings Summary' section of a performance appraisal form. At the top right of this section, there is a yellow 'Edit' button with a pencil icon, which is highlighted with a red rectangular box. Below the button, the form displays 'Employee Rating' and 'Employee Calculated Rating' for 'Area of Competence', with the calculated rating shown as 'Area of Competence (3.08)'. There are also links for 'Employee Comments' and 'Show Additional Info'.

- In the text box, provide a brief overview of successes and challenges from the past year. Be sure to include important projects, assignments, significant changes to duties or responsibilities, as well as any performance or development goals. What went well? What were some of the set-backs, challenges, or unexpected circumstances which were either overcome or impacted completion? When finished, click **Save**.

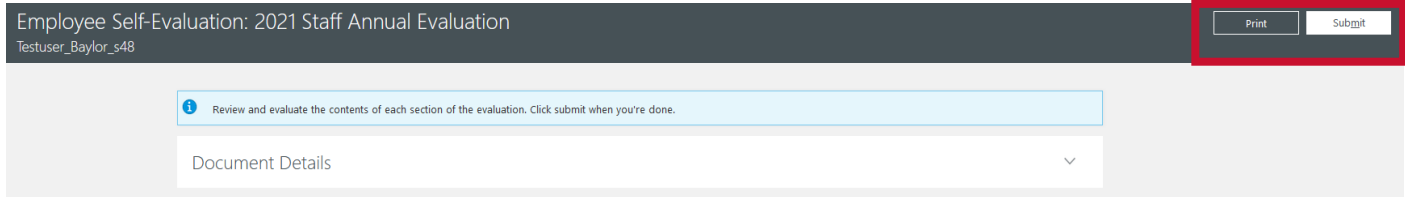


The screenshot shows the 'Ratings Summary' section with the 'Save' button highlighted by a red box. Below the 'Employee Comments' label, there is a rich text editor with a toolbar containing options for font size (set to 2), bold, italic, underline, list, link, unlink, undo, and redo. The text area below the toolbar is also highlighted with a red box. A blue information banner at the top of the form reads: 'Review and evaluate the contents of each section of the evaluation. Click submit when you're done.'

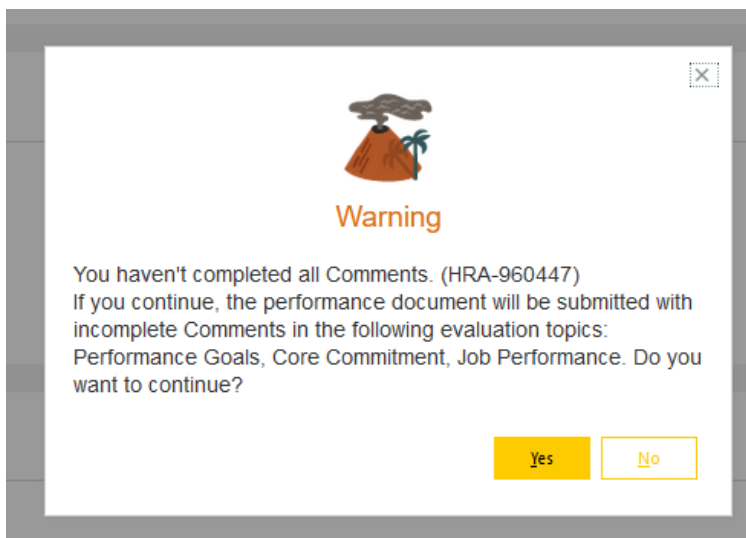


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7. When finished, click **Submit** in the upper right-hand corner of the screen to submit your self-evaluation. **Once submitted, you will not be able to make any additional changes.** Note: selecting **Print** before you submit will allow you to print or save 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.

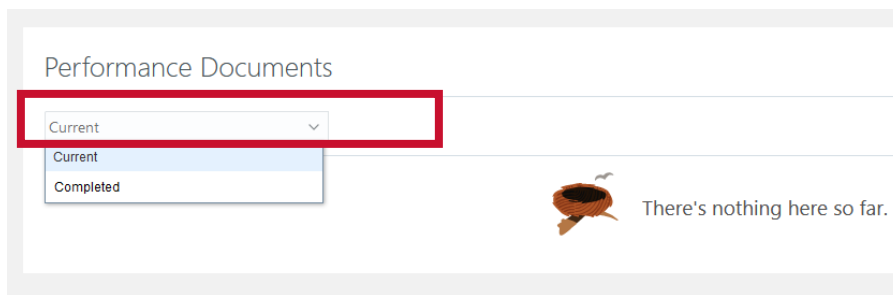


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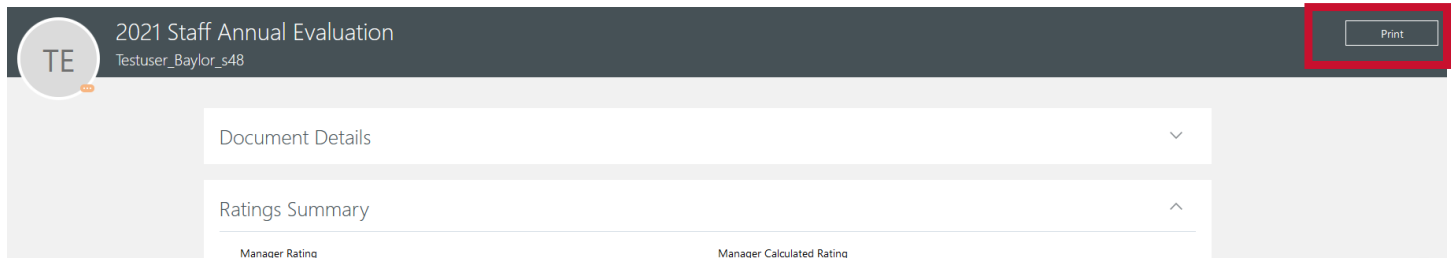
## 3. Viewing Completed Evaluation

1. Your manager will share the evaluation in Ignite. Navigate to your evaluation document as described earlier by going to **Career and Performance** from the main Ignite page, then select **Performance**. Under **Performance Documents** select **2021 Staff Annual Evaluation**.

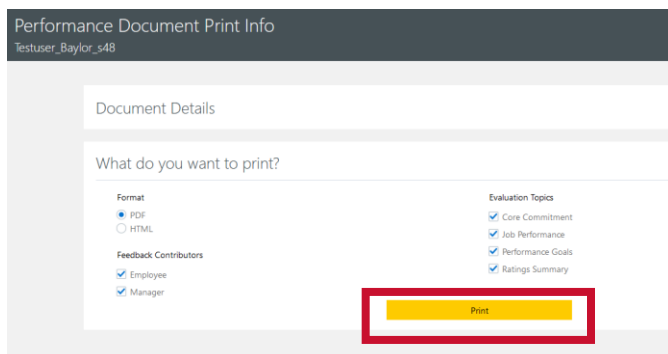
NOTE: If you are trying to open the document *after* confirming the meeting, the document will not show unless you change the drop down menu under **Performance Documents** from **Current** to **Completed**.



2. The document will open and you can view and print or save as a PDF using the **Print** button.



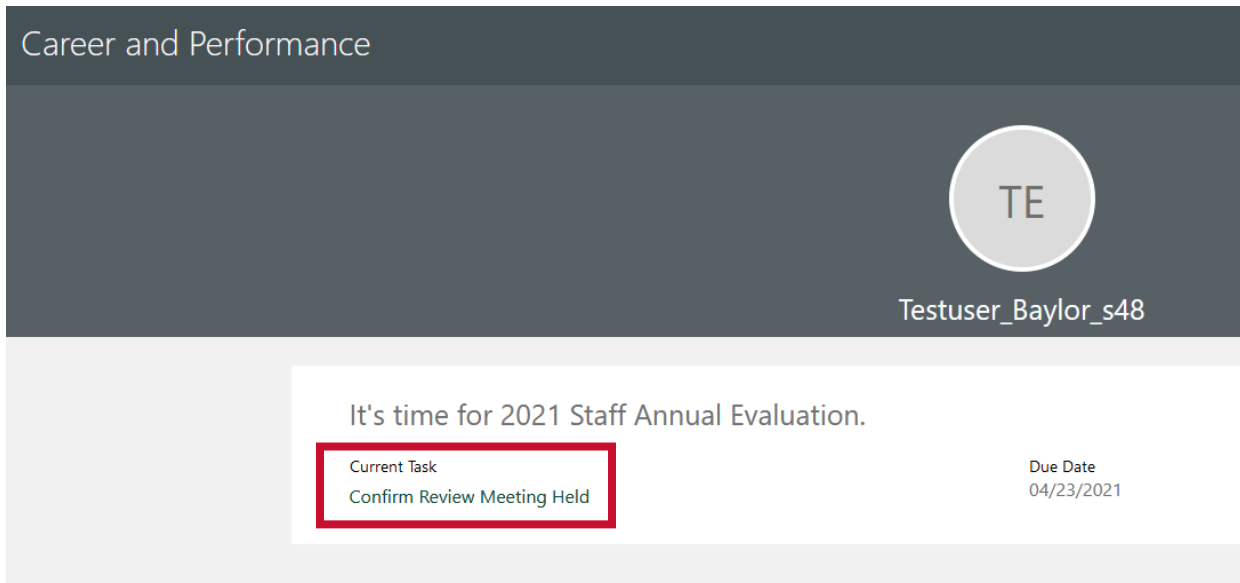
3. Selecting **Print** opens the Performance Document Print Info Screen. Choose the options you want and select **Print**.



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## 4. Indicating the Performance Discussion was Held

1. After meeting with your manager to discuss your performance over the past year you will need to indicate the discussion meeting was held in order to complete the process. Navigate to the **Career and Performance** page and select **Confirm Review Meeting Held**. Note: this link will not be active until your manager first confirms the meeting in Ignite.



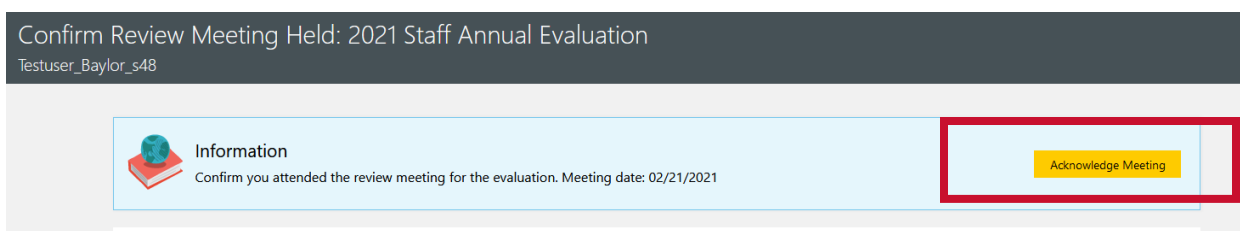
Career and Performance

TE  
Testuser\_Baylor\_s48

It's time for 2021 Staff Annual Evaluation.

Current Task	Due Date
Confirm Review Meeting Held	04/23/2021

2. Click on **Acknowledge Meeting** to confirm.



Confirm Review Meeting Held: 2021 Staff Annual Evaluation  
Testuser\_Baylor\_s48

**Information**  
Confirm you attended the review meeting for the evaluation. Meeting date: 02/21/2021

**Acknowledge Meeting**