

TALENT MANAGEMENT QUICK REFERENCE GUIDE - Manager

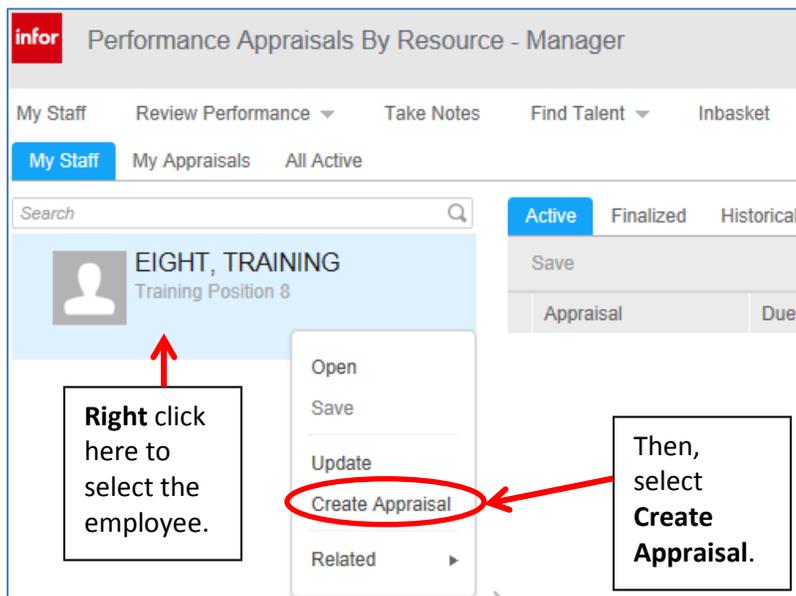
How to Create New Appraisal and Employee Planner

New appraisals should be created when one of the following occurs:

- New Review Period is starting and you need a new appraisal for an Employee
- Employee is a New Hire
- Employee Moves to a New Position (Interagency and Interagency Transfers)

Manager Creates New Appraisal

1. After you login to MAP, you will be directed to a listing of your employees' names.
2. **Right click** on employee under My Staff and click on **Create Appraisal**. (If this employee's name does not appear under **My Staff**, please contact HRIS Help Desk.)



3. **Select the Appraisal Form** - your options will be as follows:
 - a. New Appraisal Form – Non Supervisor (select if employee will not supervise)
 - b. New Appraisal Form – Supervisor (select if employee supervises employees)

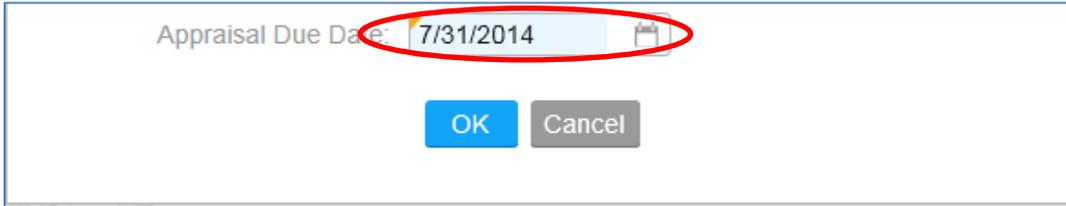
4. **Enter the Performance Review Period Start Date** (must use the four digit year).

5. **Enter the Performance Review Period End Date.**

- a. The end date may not align with your agency's Annual Appraisal Cycle, see below for specific information.
 - a) Uncovered Employee or Covered Employee with Permanent Status – date should equal the end of the agency's Annual Appraisal Cycle unless there are less than three months remaining. If there are less than three months remaining, the Performance Review Period end date should skip the upcoming Annual Appraisal Cycle end date and instead should equal the Annual Appraisal Cycle end date one year later (e.g., if an agency is on a January 1 through December 31 cycle, and the employee is hired on October 15th 2013, the end date of the employee's appraisal period should be December 31, 2014, not December 31, 2013).
 - b) Covered Employee / Promotional Probation – date should equal six months from date of promotion.
 - c) Covered Employee / Original Probation – date should equal one year from date of appointment to the covered position.
- b. If you are unsure of the proper date or have any questions, please contact your agency's Human Resources office.

6. **Enter the Appraisal Due Date.**

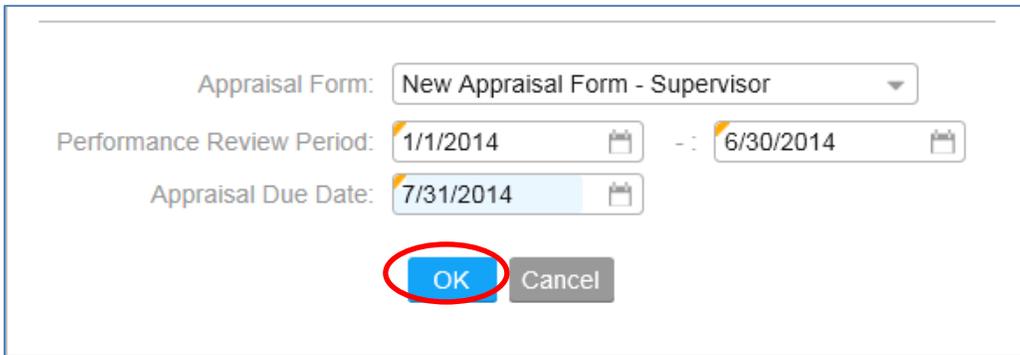
- a. This date will be the last day of the month following the Annual Appraisal Cycle End Date UNLESS the employee is on Promotional Probation or Original Probation. In those cases, the Appraisal Due Date is thirty days before the last day of probation.



Appraisal Due Date: 7/31/2014

OK Cancel

7. **Click OK.**



Appraisal Form: New Appraisal Form - Supervisor

Performance Review Period: 1/1/2014 - 6/30/2014

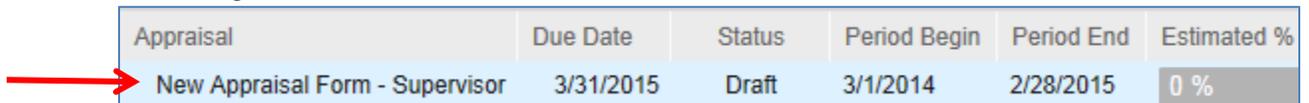
Appraisal Due Date: 7/31/2014

OK Cancel

Manager Creates and Acknowledges the Performance Plan

1. **Double click** on the employee's appraisal to the right:

- a. Please make sure you select the proper appraisal by confirming the Appraisal Name and Period Begin and Period End Dates.



Appraisal	Due Date	Status	Period Begin	Period End	Estimated %
New Appraisal Form - Supervisor	3/31/2015	Draft	3/1/2014	2/28/2015	0 %

2. Click on **Start Appraisal**. If you already began the appraisal, click **Continue Appraisal**.

infor TRAINING EIGHT- Performance Appraisal: New Appraisal Form - Non Supervisor - Manager

My Staff Review Performance ▾ Take Notes Find Talent ▾ Inbasket

TRAINING EIGHT- Performance Appraisal: New Appraisal Form - Non Supervisor

Start Appraisal Notify Resource Update Overall Rating

TRAINING EIGHT - TRNPOS8
 Performance Review Period: 3/10/2014 - 3/9/2015
 Please Complete By: 3/31/2015
 Estimated % Complete: 0%
 Appraisal Owner: 3 TRAINING THREE

To begin the employee appraisal, click Start Appraisal. To review detailed descriptions of competencies, click on the instructions link below.

Competencies & Standards | Attachments | Take Notes | Consolidated Appraisal | Self Appraisal | Historical Appraisals

3. Click on **Agency Specific Competencies** link found on the left portion of the screen.
 - a. If the agency specific competencies are not listed and the message **'NO DATA TO DISPLAY'** is listed, please contact the HRIS Help Desk before proceeding any further.

Evaluate Criteria

- Statewide Competencies
- Agency Specific Competencies**
- Performance Period Results
- Performance Plan Acknowledgement
- Development Actions

4. Click on the **Performance Period Results** link found on the left portion of the screen.

Evaluate Criteria

- Statewide Competencies
- Agency Specific Competencies
- Performance Period Results**
- Performance Plan Acknowledgement
- Development Actions

5. Input SMART results in the **Overall Section Comments** box.

1 RESULTS ORIENTATION: Consistently delivers required business results; sets and achieves achievable, yet aggressive, goals; consistently complies with quality, service and productivity standards and meets deadlines; maintains focus on agency goals.

Needs Improvement Meets Expectations Exceeds Expectations

Comments:

Overall Section Comments:

SMAART RESULTS FOR 1/1/2013 - 12/31/2013

1. Enter SMART RESULT #1
2. Enter SMART RESULT #2

- Employees cannot view the Results from the appraisal. Therefore, you must transmit the SMAART Results to the employee in some other manner (e.g., email, Word document, Take Notes, etc.).*
- If you are using a method other than **Take Notes**, proceed to step 6. If you want to use the **Take Notes** feature to transmit the SMAART Results to the employee, follow the instructions below.*
- Highlight the SMAART Results that you entered in the Overall Comments Box. Press "Ctrl C" on your keyboard to copy the Results so that you can paste them into a Note after you have completed the rest of this process.*

- Go to **Performance Plan Acknowledgement** link on left portion of screen and read the acknowledgement statement.

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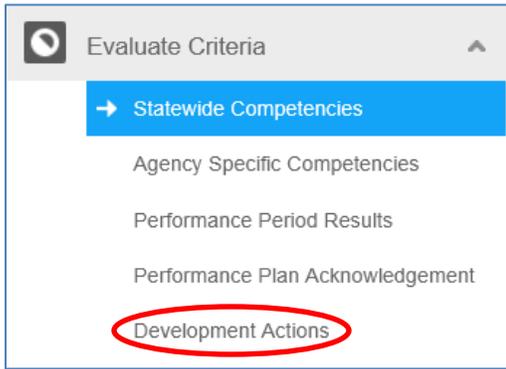
- Click **Yes** after it has been ensured you have complied with the requirements of the acknowledgement statement.

1 Performance Plan Acknowledgement Selecting "Yes" below indicates that the supervisor and employee have discussed the performance plan and that the discussion included review of the competencies, performance period results and work standards upon which the employee will be evaluated.

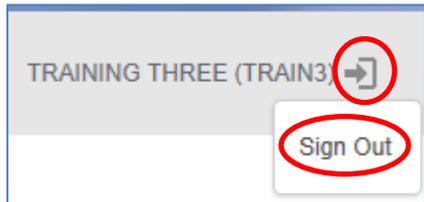
Yes No

Comments:

- Click **Development Actions** link. The development actions section should be used to record key development activities the supervisor and employee identify in their planning that will directly lead to improved employee performance during the appraisal cycle.



9. If completed, please logout of the MAP system. Click the arrow next to your name in the upper right hand corner and then click **Sign Out**.



If you have any questions regarding MAP, please contact your Human Resources Department.