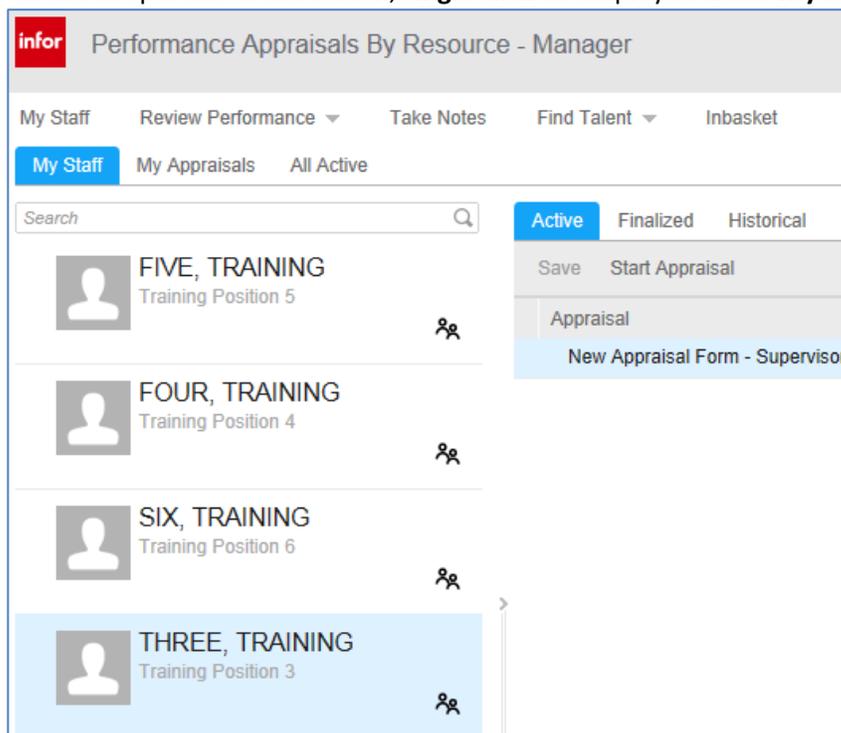


TALENT MANAGEMENT
QUICK REFERENCE GUIDE - Manager
How to Rate Your Employee and Submit Appraisal to Upline Manager

Before proceeding, make sure you have created an appraisal for the employee for the current appraisal period.

Manager Completes the Performance Appraisal

1. After you login to MAP, you will find a listing of your employees' names.
2. On the left portion of the screen, **single click** on employee under **My Staff**.



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 %

3. You are now at the Main Page of the Employee's Appraisal. The page displays employee's data such as name, position number, review period, and the due date of the review. This page also allows you to review the instructions for evaluating the competencies, upload attachments that are relevant to the review, document notes throughout the review period, print a consolidated appraisal, review the employee's self-appraisal and view historical appraisals.

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](#)

1. Here are brief instructions for each of these sections:

- a. **Competencies & Standards**

1. Click on the **Competencies & Standards** link.
2. A PDF document will appear with a list of all competencies.
3. You can click on any competency to view the competency description and standards associated with that particular competency. The agency specific competencies section lists all available competencies. Please contact your Supervisor or HR Manager to review your division competency packet.
4. To return to the appraisal, click the **Back**  button in your browser.

- b. **Attachments**

1. Click on the **Attachments** link.
2. To add an attachment, click on the **Actions** link and then click **Create**.
3. Click on **Folder**, then **Browse** for the attachment on your computer.
4. **Highlight** the file you want to upload and then click **Open**.
5. Click the **Save icon**  on upper left of the toolbar.
6. To return to the appraisal, click the **Back**  button in your browser.

c. Take Notes

1. Click on **Take Notes** link.
2. Click **Create**.
3. Today's date will automatically default in the date field; however, if you wish to enter a different date you can type it in or select the date by clicking on the calendar icon.
4. Type the information you want to document in the **Note** provided.
5. Check the **Public** checkbox (if you want your employee to review note) otherwise leave the box unchecked and the note will remain private to you.
6. To add an **Attachment**, click on the **Browse** link, browse for the attachment on your computer and then click **Open**.
7. Highlight the file you want to upload and then click **Open**.
8. Click **OK** to save the note and/or the uploaded document.
9. To return to the appraisal, click the **Back**  button in your browser.

d. Consolidated Appraisal

1. To view the Appraisal, click on the Consolidated Appraisal link.
2. The entire appraisal will open into a PDF.
3. To return to the appraisal, click the **Back**  button in your browser.

e. Self-Appraisal

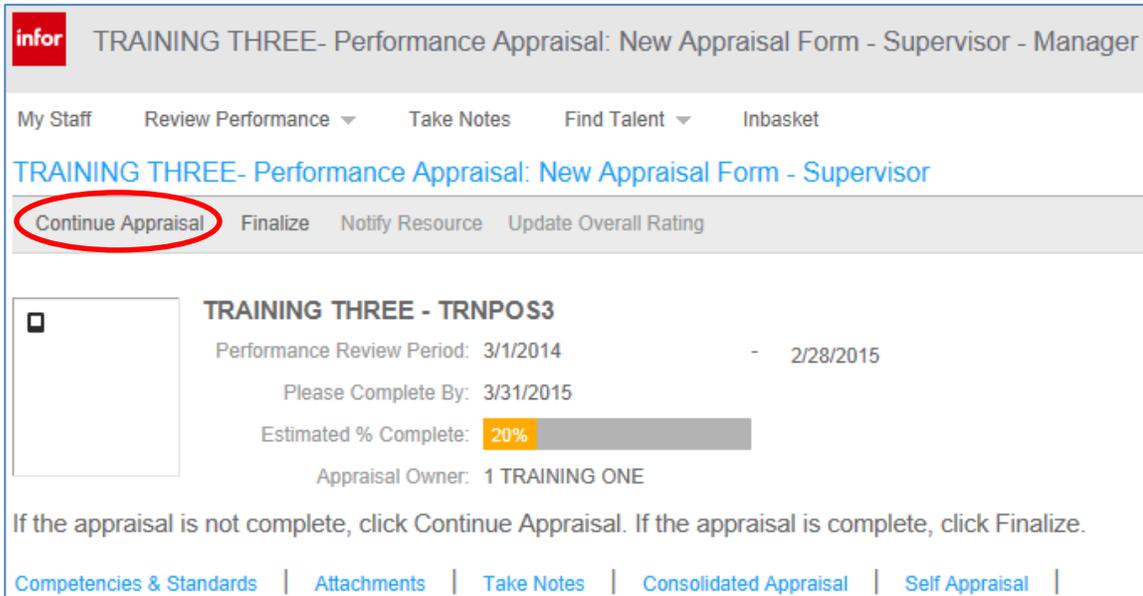
1. If your direct report has completed a self-appraisal, you may view it here by clicking on the Self-Appraisal link and then click on the Appraisal link in the upper left corner.
2. You may also view the Self-Appraisal through the Consolidated Appraisal link once the employee has finalized their self-appraisal.
3. If your direct report has NOT completed a self-appraisal, there will be nothing displayed.
4. To return to the appraisal, click the **Back**  button in your browser.

f. Historical Appraisals

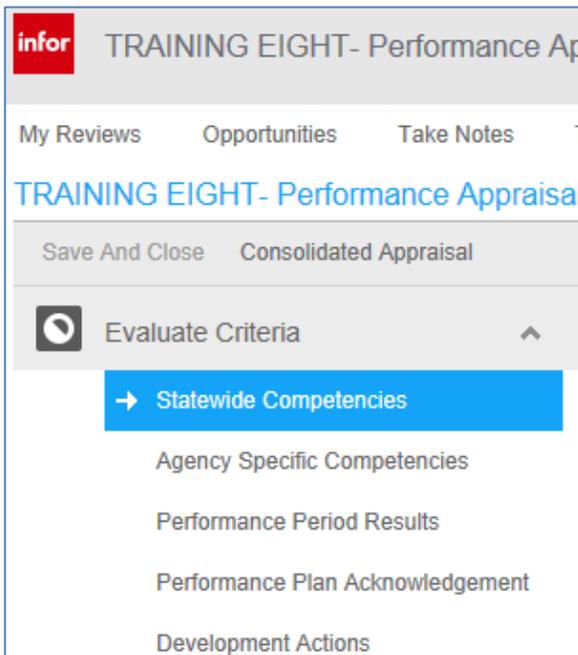
1. All appraisals that have been finalized and acknowledged (by employee and supervisor) will appear in this list.
2. Once an appraisal has been moved to the Historical section, there can be no further editing on the document.
3. To view an appraisal, single click the appraisal, then click **Consolidated Appraisal**.
4. To return to the appraisal, click the **Back**  button in your browser.

Performance Appraisal – Complete Ratings and Comments

1. To begin the appraisal, click the **Continue Appraisal** on the Main Page of the Employee’s Appraisal (upper left corner).



2. Here is a screen shot and brief instructions for each section of the employee’s appraisal.



- a. The first link is **Statewide Competencies**. There are three statewide competencies for the non-supervisory positions and four statewide competencies for supervisory positions.
 - i. Review each competency and compare the employee’s performance against the standards associated with that particular competency (found under the Competencies & Standards link).
 - ii. You should also review the employee’s MAP Planner to refresh your memory on what specific tasks or metrics you will be evaluating the employee on.

- iii. Once you have reviewed the Statewide competency standards, **select your rating** for each competency by clicking on the appropriate rating:
 1. Needs Improvement
 2. Meets Expectations, or
 3. Exceeds Expectations.
 - iv. Then, enter your **Comments** supporting the ratings you have chosen for each competency.
 - v. Click the **Next** link which is found on the bottom of the page (or by clicking on another link will save your responses).
- b. The second link is **Agency Specific Competencies**. There are three agency specific competencies for each position. Review each competency and compare the employee's performance against the standards associated with that particular competency (found under the Competencies & Standards link).
- i. Once you have reviewed the Agency Specific competency standards, **select your rating** for each competency by clicking on the appropriate rating.
 - 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.
 - ii. Then, enter your **Comments** supporting the ratings you have chosen for each competency.
 - iii. Click the **Next** link which is found on the bottom of the page (or by clicking on another link will save your responses).
- c. The third link is **Performance Period Results**. This is the section that was completed during the Performance Planning phase.
- i. You must evaluate the SMAART results (if any were created for this rating period) as well as the standard Results Orientation competency and **select your rating** for this section.
 - ii. Then, enter your **Comments** supporting the rating you have chosen for SMAART Results and the Results Orientation competency in the **COMMENTS** section (not OVERALL COMMENTS section).
 - iii. Click the **Next** link which is found on the bottom of the page (or by clicking on another link will save your responses).
- d. The fourth link is **Performance Plan Acknowledgement** which was completed during the Performance Planning phase. No action is needed at this time in this section.

- e. The fifth link is **Development Actions** which may have been completed during the Performance Planning phase.
 - i. No action is needed at this time in this section unless the section is still blank which in that case you will need to enter a **comment** since this section is required. (*You may enter N/A if there are no development actions at this time*).
3. Once completed with all steps, click **Finish** (button is found at bottom of screen) or click the **Back**  button in your browser.

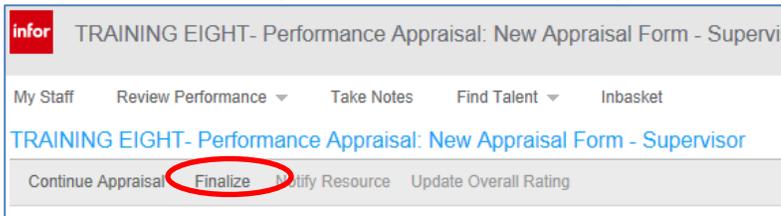


4. If you wish to view the appraisal, click the **Consolidated Appraisal** link.

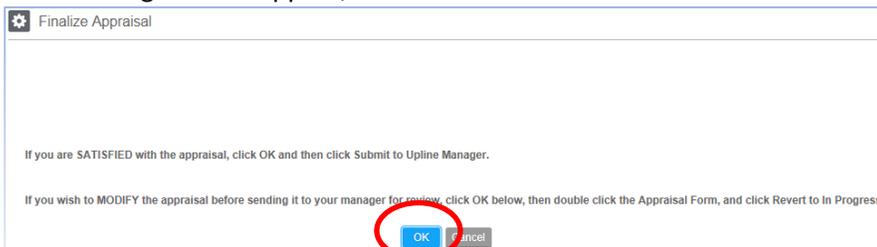


Finalize the Performance Appraisal

1. Once the review is completed, click **Finalize** in the upper left corner.



2. A new dialog box will appear, click **OK** to confirm.



PLEASE NOTE: Finalize does NOT Submit to Upline and does NOT mean the appraisal process is complete. Continue to next step.

3. Click **Submit To Upline Manager**.

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

My Staff Review Performance ▼ Take Notes Find Talent ▼ Inbasket

TRAINING EIGHT- Performance Appraisal: New Appraisal Form - Supervisor

Revert To In Progress Notify Resource Update Overall Rating **Submit To Upline Manager**

TRAINING EIGHT - TRNPOS8

Performance Review Period: 1/1/2014 - 12/31/2014

Please Complete By: 1/31/2015

Overall Rating: Meets Expectations

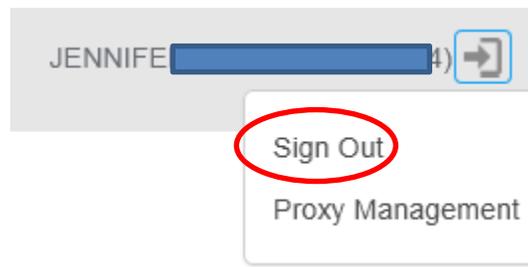
Estimated % Complete: 100%

Appraisal Owner: 3 TRAINING THREE

To make changes to a finalized appraisal, click Revert To In Progress. To send the appraisal to the upline manager for acknowledgment, click Submit to Upline Manager.

[Competencies & Standards](#) | [Attachments](#) | [Take Notes](#) | [Consolidated Appraisal](#) | [Self Appraisal](#) | [Historical Appraisals](#)

4. You are now ready to discuss the employee's appraisal with your Upline Manager. You must do this **before** you share it with the employee.
5. Once the Upline Manager **Approves** the appraisal, you may share it with your employee.
6. 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.