MANAGER GUIDE

INFOR PERFORMANCE APPRAISALS

Step-by-Step Guide

Revised 12.12

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TIP: *NOT SURE WHEN A SECTION ENDS? EACH SECTION BEGINS WITH PAGE 1 AND HAS A UNIQUE TITLE LISTED ON THE BOTTOM HEADER.*

OVERVIEW OF PERFORMANCE APPRAISALS

TIMELINE & KEY DATES

SEPTEMBER 27TH - OCTOBER 9TH

200 & 300 level employees may complete a voluntary self -assessment form. These forms are turned in **directly** to the **supervisor** and are due no later than **October 9th.**

OCTOBER 7TH

Departments will begin working on Evaluation Spreadsheets (sent to Directors). Supervisors may begin creating draft evaluations in Infor. Do not submit for upline approval until ELT has reviewed and finalized **(Late Nov/Early Dec)**.

NOVEMBER 1ST

Department Evaluation Spreadsheets with proposed rating for each employee are due to Human Resources. Must be submitted by Director or designee.

DECEMBER 2ND

Performance Evaluation sheets are returned to departments with edits. **After clearance from Director, the supervisors may begin meeting with Employees and submitting reviews for upline approval in Infor.**

DECEMBER 16TH

All performance conversations should have been held with employees. Deadline for Employee Acknowledgment in Infor

JAN 1, 2025

Merit Raises will take effect. (HR will do Form 12s this year). First paycheck with merit raises will be Jan 17th.

JAN 17, 2025

First paycheck with merit raises will be Jan 17th.

SCAN CODE FOR MORE INFORMATION AND TO WATCH AN INSTRUCTIONAL VIDEO

OVERVIEW OF PERFORMANCE APPRAISALS
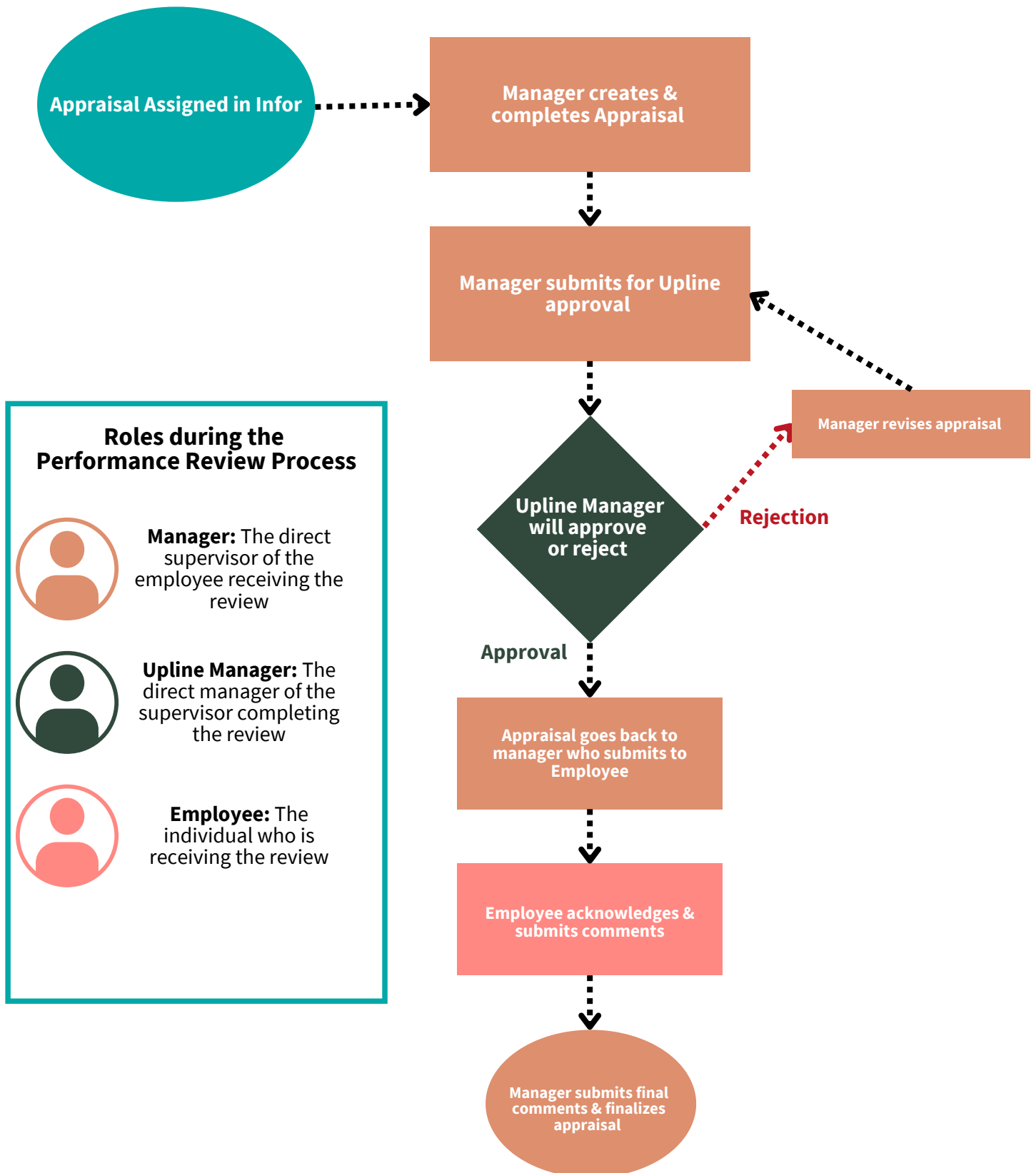
ELIGIBILITY

- ALL FULL-TIME & PART TIME **CIVILIAN** EMPLOYEES
- HIRED ON OR BEFORE **03/31/2024**
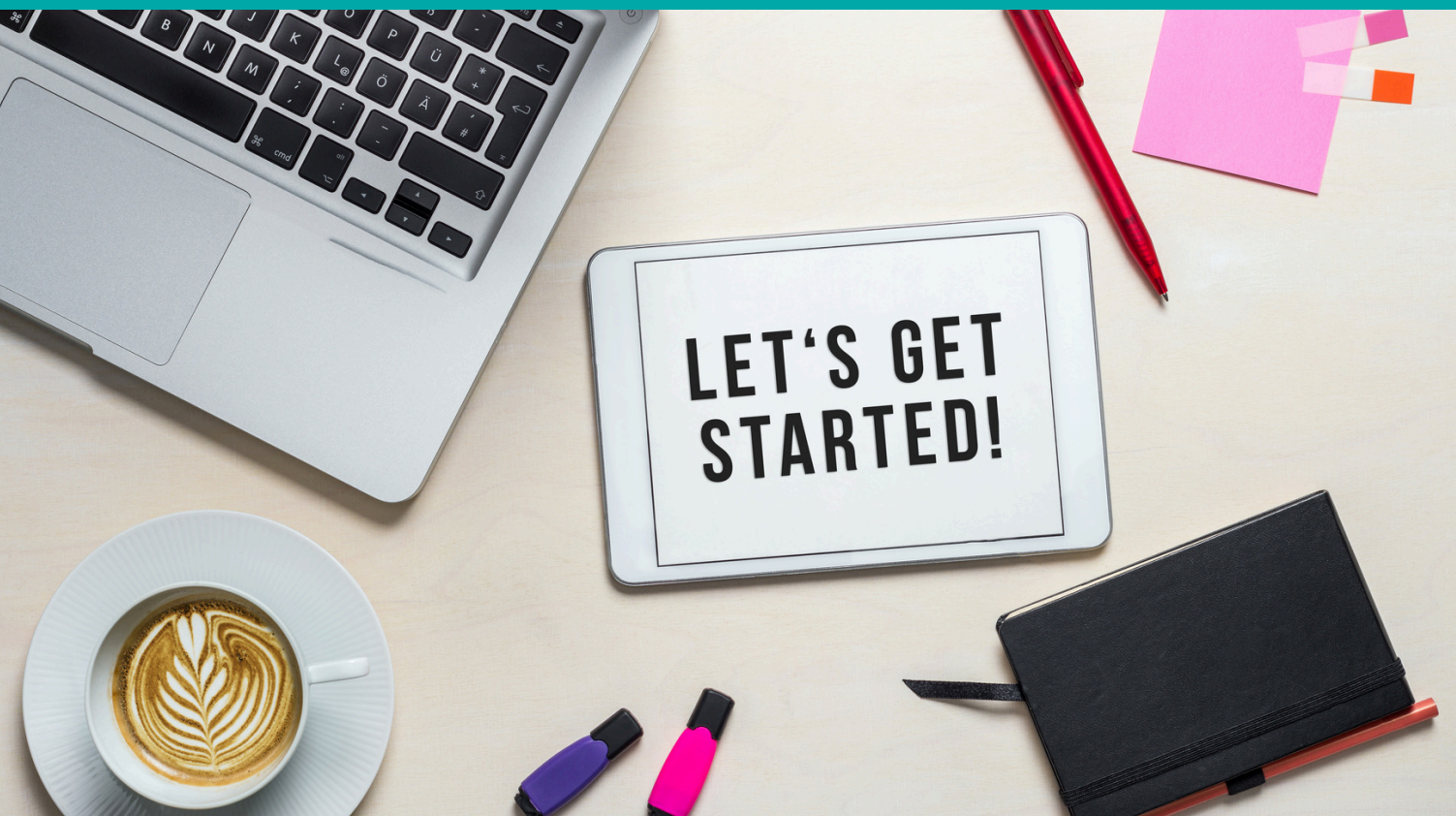- FORM MUST BE COMPLETED BY **CURRENT**, IMMEDIATE SUPERVISOR

RATING SCALE

Does Not Meet Expectations
1 — Does not meet the expectations of the job, task, or project. **Improvement Plan Required.**

Needs Improvement
2 — Meets some expectations of the job, task, or project. Performance Plan at discretion of Manager.

Meets Expectations
3 — Successfully and consistently meets the expectations of the job, task, or project.

Exceeds Expectations
4 — Far exceeds the expectations of the job, task, or project.

PIPS (PERFORMANCE IMPROVEMENT PLANS)

- GIVEN WHEN THE **OVERALL** RATING IS A 1.
  - ➤ AT SUPERVISOR DISCRETION FOR OVERALL RATING OF 2

- SUPERVISORS MUST COORDINATE WITH **EMPLOYEE RELATIONS**

- FORM MUST BE **SEPARATE DOCUMENT FROM APPRAISAL**
  - ➤ IMPROVEMENT PLANS SHOULD NOT BE WRITTEN WITHIN THE APPRAISAL DOCUMENTS.

- **ORGANIZATIONAL DEVELOPMENT** CAN ASSIST WITH ASSIGNING/RECOMMENDING TRAININGS, IF NEEDED.

Appraisal Assigned in Infor

Manager creates & completes Appraisal

Manager submits for Upline approval

Manager revises appraisal

Upline Manager will approve or reject

Rejection

Approval

Appraisal goes back to manager who submits to Employee

Employee acknowledges & submits comments

Manager submits final comments & finalizes appraisal

Roles during the Performance Review Process

Manager: The direct supervisor of the employee receiving the review

Upline Manager: The direct manager of the supervisor completing the review

Employee: The individual who is receiving the review

USE THESE INSTRUCTIONS FOR NEW APPRAISALS

LET'S GET STARTED!

IF YOU HAVEN'T ENTERED ANY DATA IN, THIS SECTION IS FOR YOU

FIRST STEP: LOGIN INTO INFOR
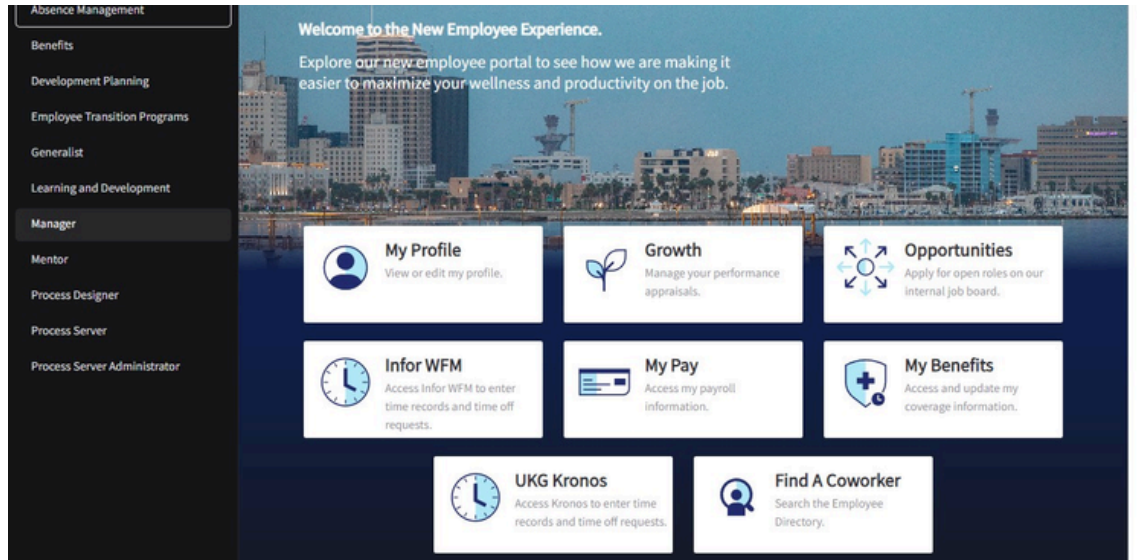
Diagram 1 : Infor Landing Page

CLICK ON "EMPLOYEE"
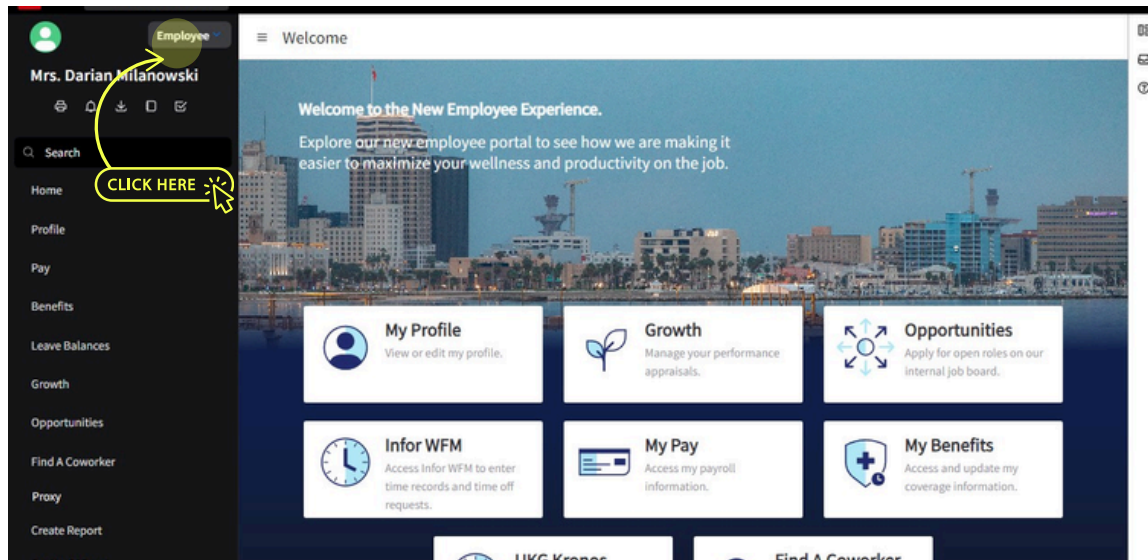

Diagram 2 : Left Hand Bar Dropdown

SCAN CODE FOR MORE INFORMATION AND TO WATCH AN INSTRUCTIONAL VIDEO

ON YOUR DROPDOWN MENU, CLICK ON "MANAGER"
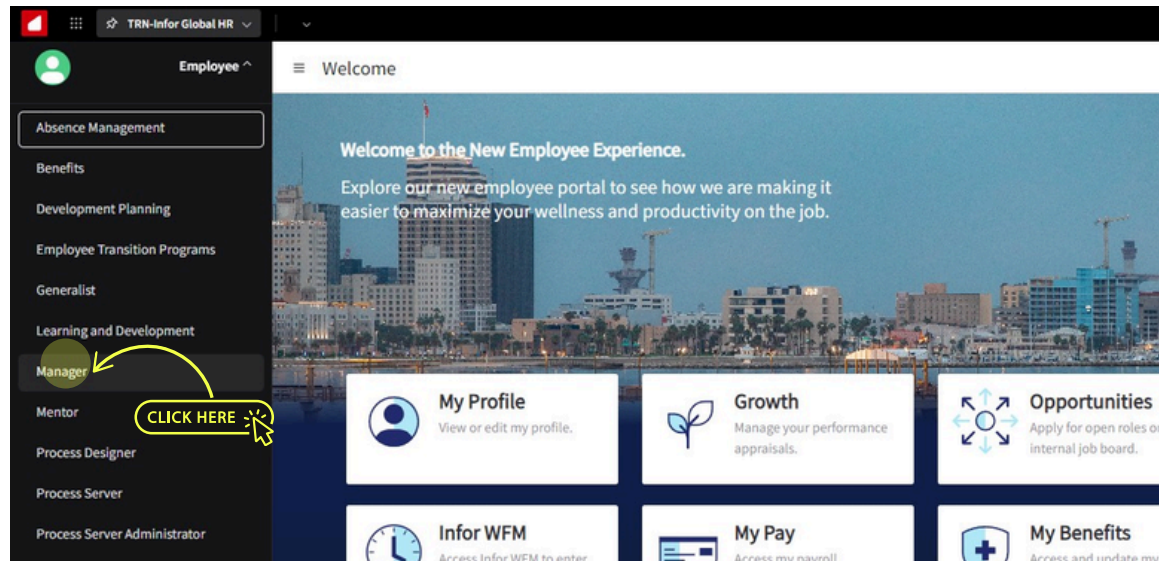
Diagram 3 : Left-Bar Dropdown Menu

CLICK ON "REVIEW PERFORMANCE"
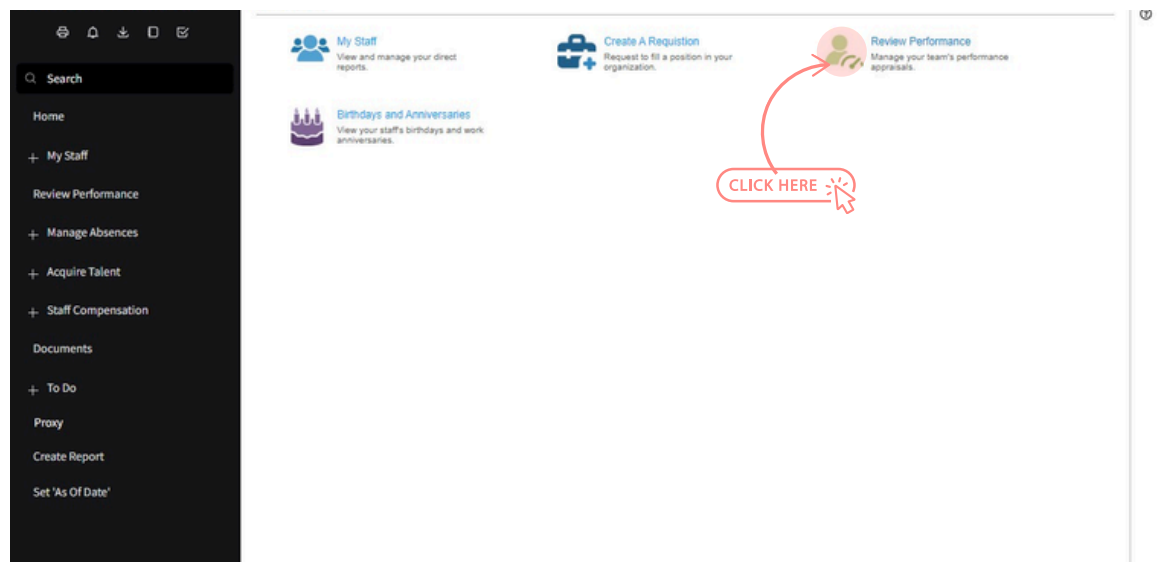
Diagram 4 : Manager Space

❚❚ NO REVIEWS? CLICK REFRESH

GO SEE REVIEWS? SKIP TO NEXT STEP
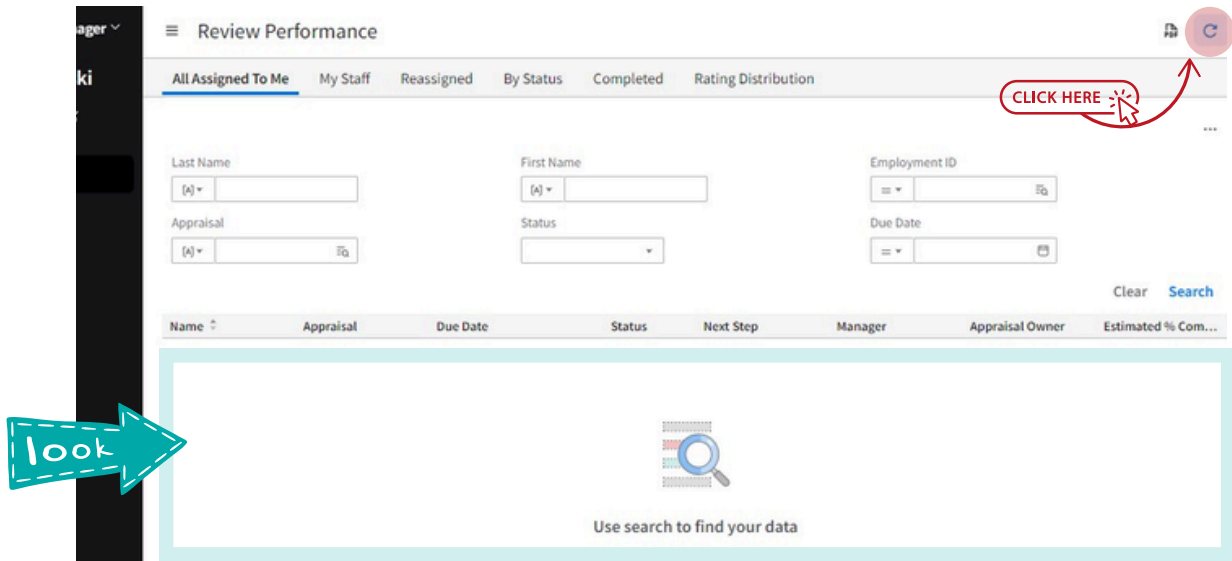
Diagram 5 : Performance Dashboard

DOUBLE-CLICK ON THE EMPLOYEE
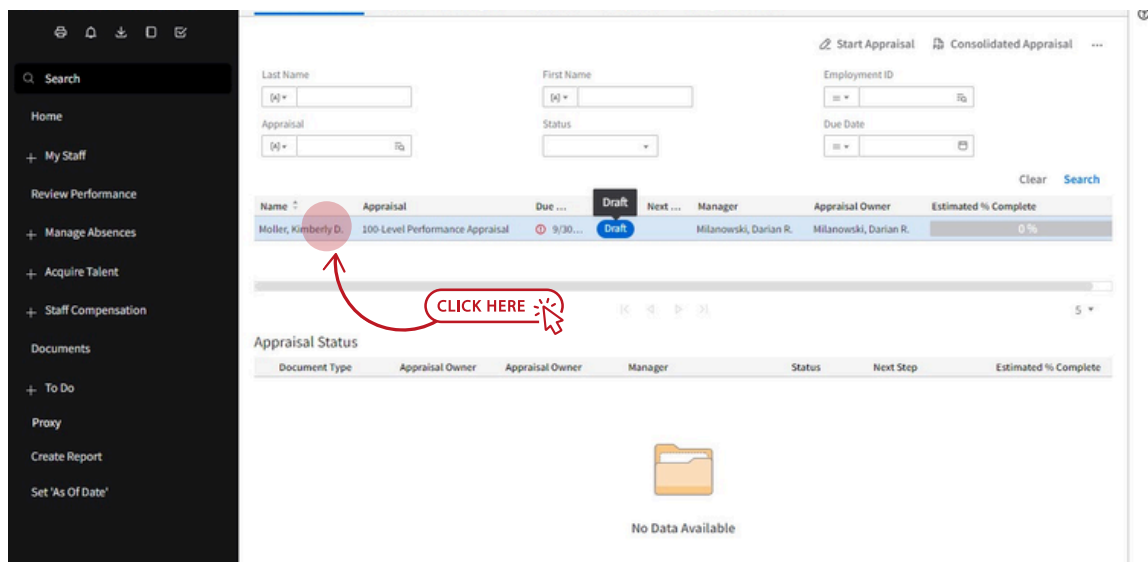
Diagram 6 : Performance Dashboard
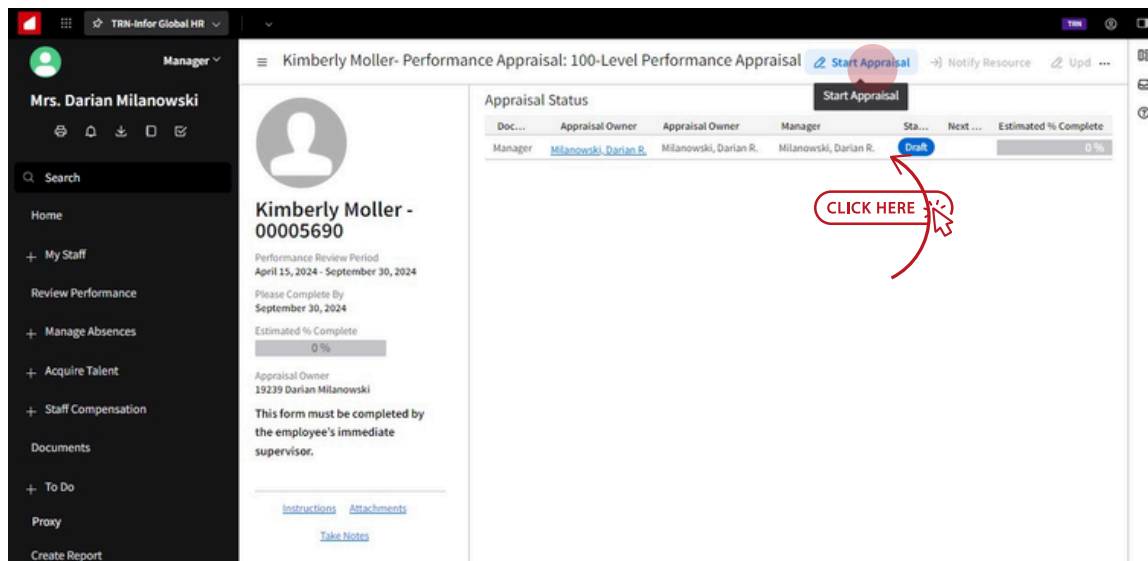
CLICK "START APPRAISAL"

Diagram 7: Employee Performance Start Screen

SELECT THE RATING FOR EACH CRITERIA.
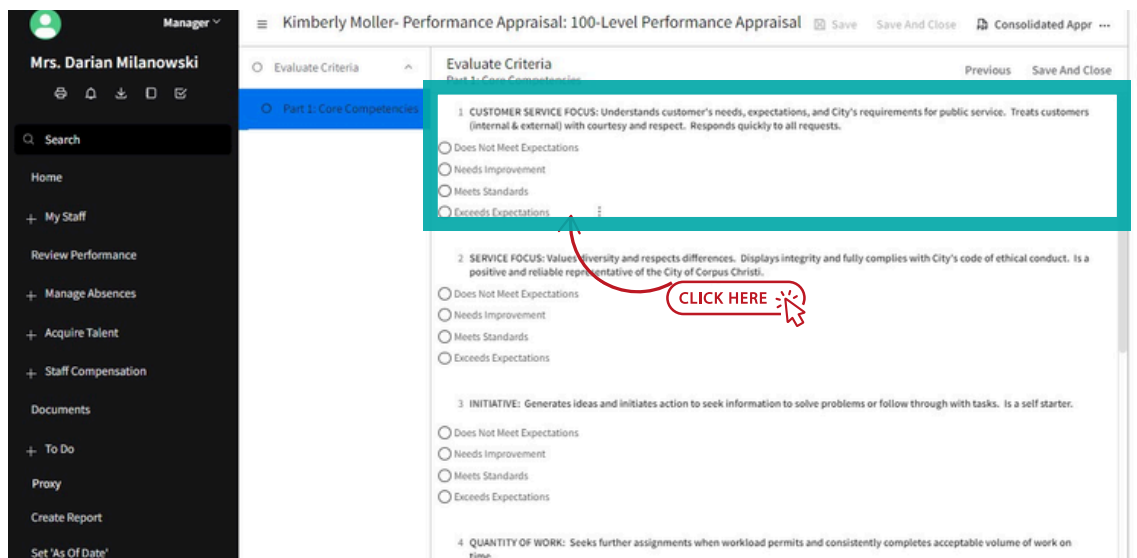## ALL CRITERIA MUST HAVE A RATING TO SUBMIT.

Diagram 8 : Performance Appraisals

AT THE BOTTOM - CLICK IN THE TEXTBOX FOR "OVERALL SECTION COMMENTS". <u>SECTION COMMENTS ARE MANDATORY</u>; HOWEVER; YOU MAY ELECT TO KEEP SECTION COMMENTS BRIEF.
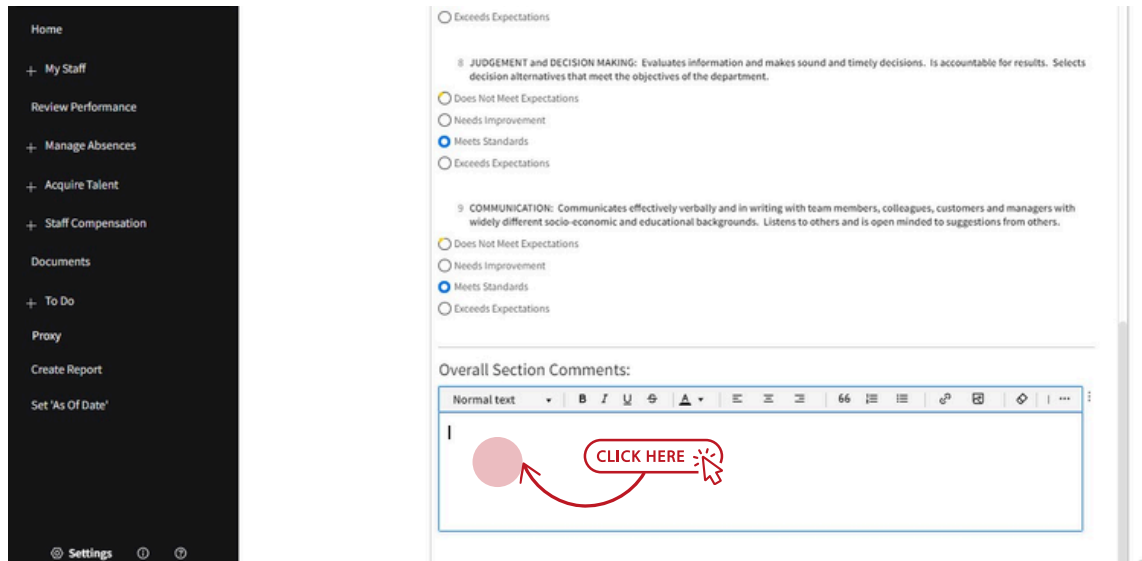

Diagram 9: Overall Section Comments

❚❚ ARE YOU REVIEWING A 100 EMPLOYEE? SKIP THIS STEP
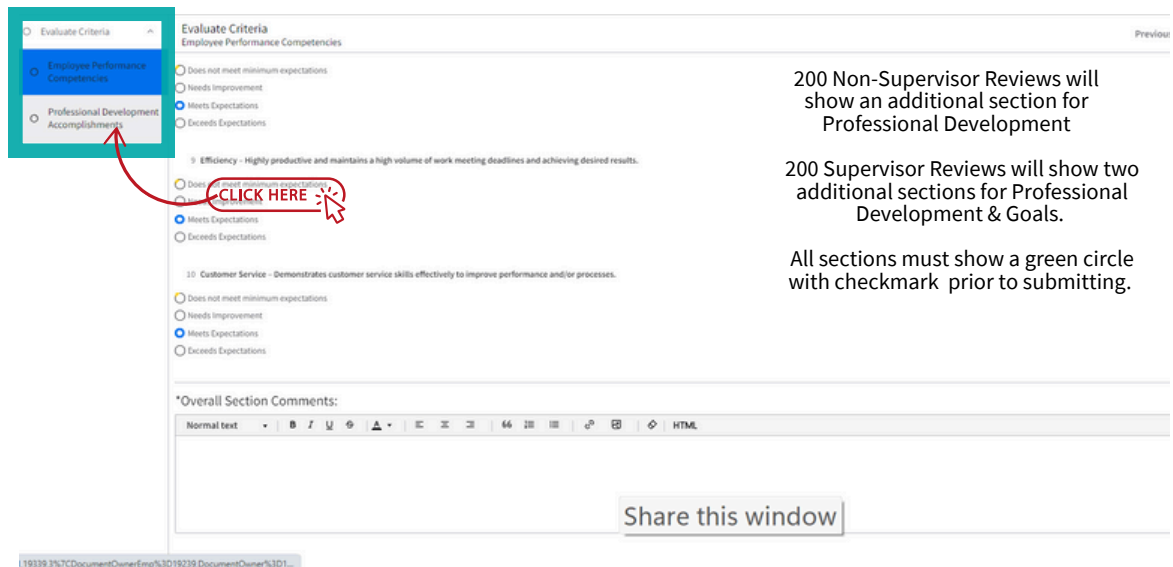
GO RATING A 200 EMPLOYEE? CONTINUE

200 Non-Supervisor Reviews will show an additional section for Professional Development

200 Supervisor Reviews will show two additional sections for Professional Development & Goals.

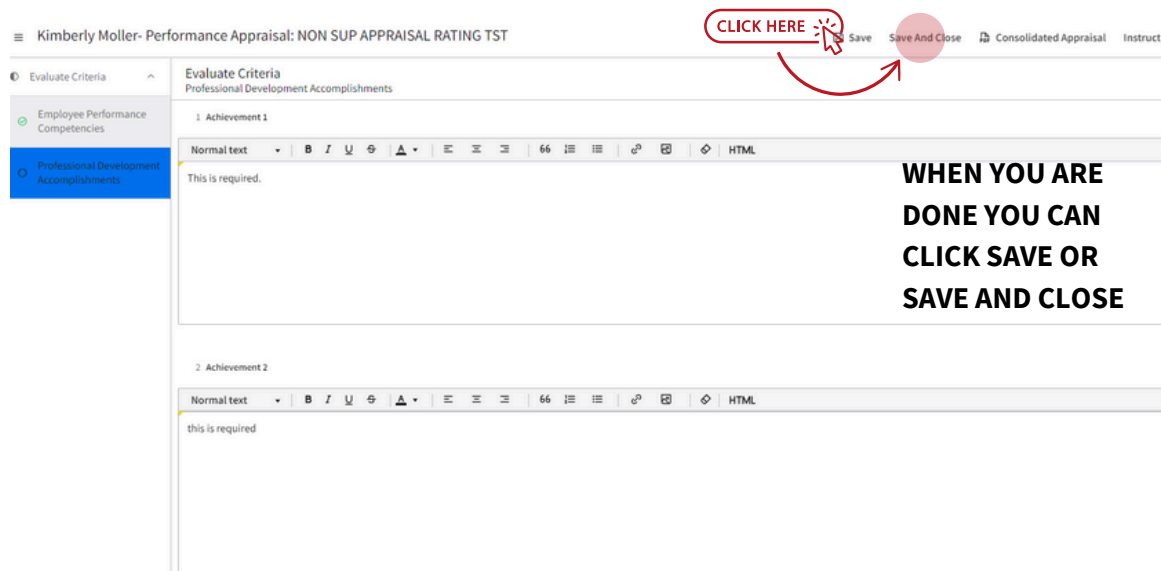All sections must show a green circle with checkmark prior to submitting.
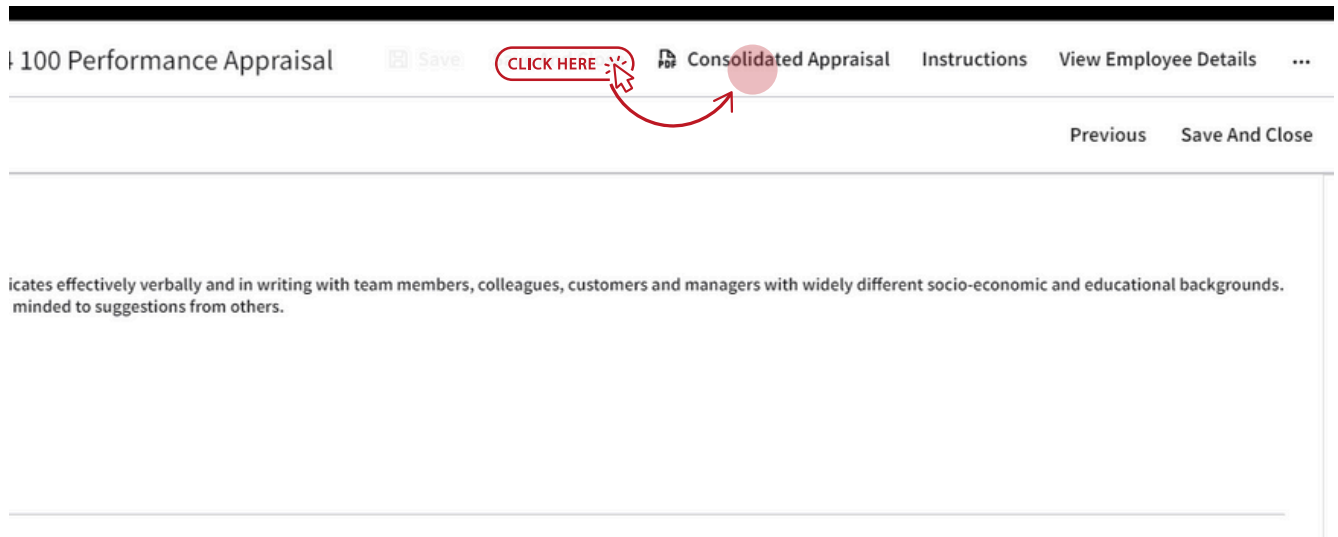
Diagram 10: Section Box

WHEN YOU ARE DONE, CLICK SAVE AND CLOSE.

WHEN YOU ARE DONE YOU CAN CLICK SAVE OR SAVE AND CLOSE

Diagram 11: Saving Performance Reviews

TO VIEW CALCULATED SCORE CLICK ON "CONSOLIDATED APPRAISAL" If nothing loads, please disable pop-up blocker.

Diagram 12: Consolidated Appraisal Button

YOUR SCORE SHOULD AUTO-CALCULATE THE RAW SCORE & FINAL OVERALL RATING

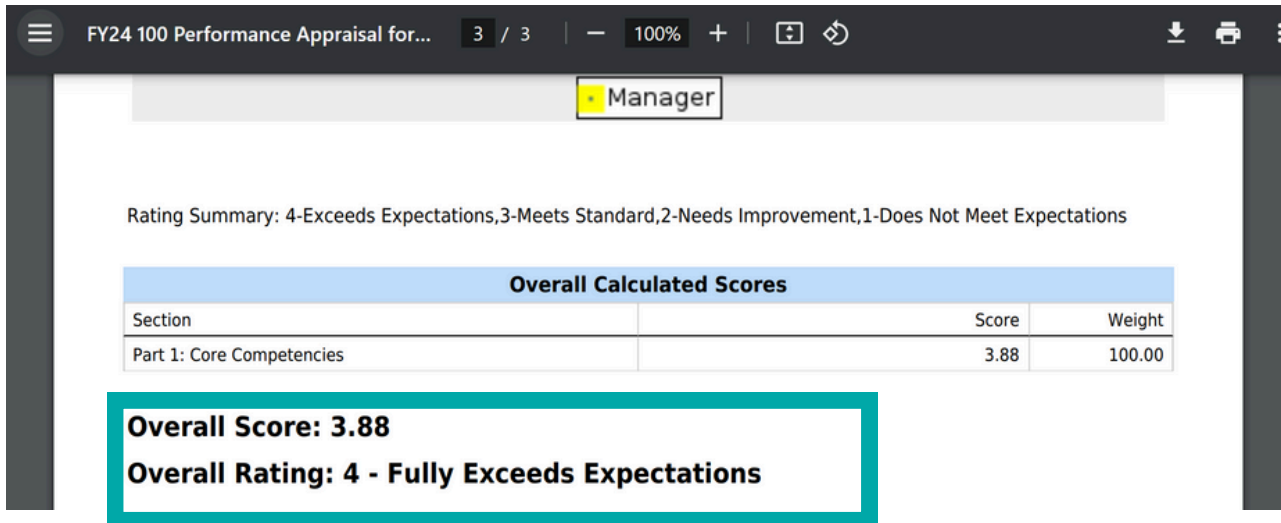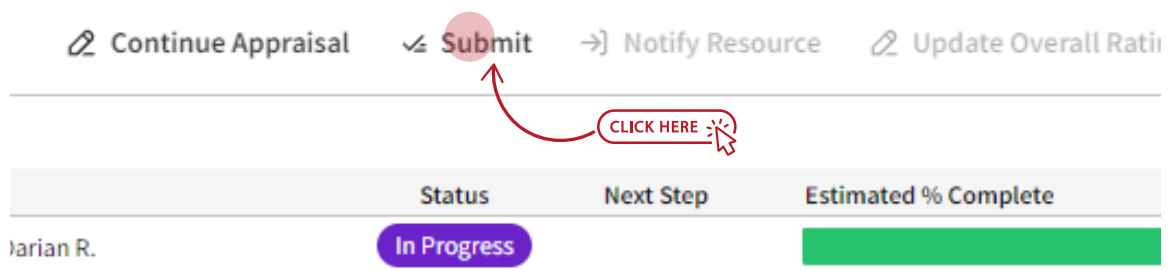**IF THE OVERALL RATING SAYS "O -", PLEASE CALL HR FOR ASSISTANCE.**

Diagram 13: Viewing the Overall Rating

CLICK ON SUBMIT TO ENTER PRE-UPLINE APPROVAL STATUS
This will not submit to your upline manager, you can still edit if needed

Verify the estimated completion is at 100%. If not, click continue appraisal and ensure all sections are completely filled out. When you're ready, click submit.

THE STATUS SHOULD CHANGE TO "READY FOR REVIEW"

Diagram 14: Submission Screen

STOP DO NOT SUBMIT TO UPLINE MANAGER UNTIL YOUR DEPARTMENT RECEIVES ELT APPROVAL.

CLICK SUBMIT TO UPLINE MANAGER

THE STATUS SHOULD CHANGE TO "READY FOR REVIEW"

Diagram 15: Upline Manager

WHEN SUCCESSFULLY SUBMITTED, THE STATUS WILL TURN ORANGE. NOW YOU WILL WAIT FOR UPLINE APPROVAL.

Diagram 16: Upline Approval Success

USE THESE INSTRUCTIONS FOR DRAFT APPRAISALS

TO BE CONTINUED....

IF YOU ALREADY ENTERED IN DATA AND SAVED, THIS SECTION IS FOR YOU

SUBMITTING DRAFT APPRAISALS
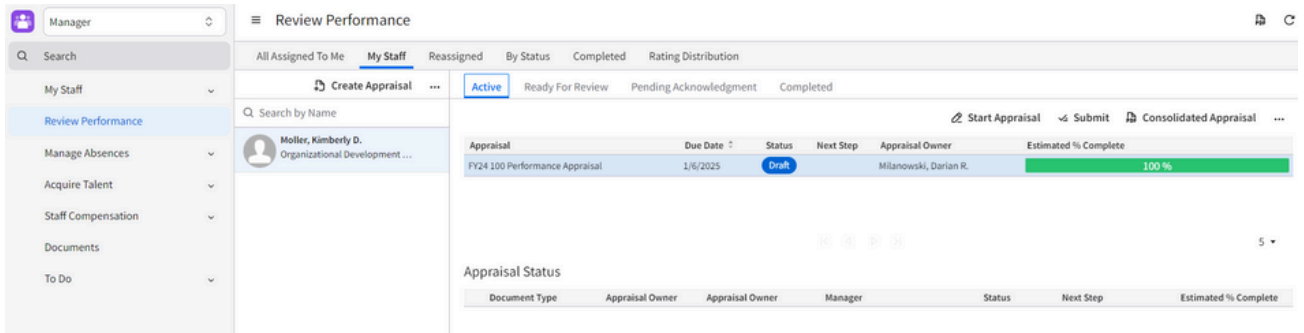
NAVIGATE TO MANAGER -> REVIEW PERFORMANCE -> MY STAFF

Diagram 1 : My Staff Tab
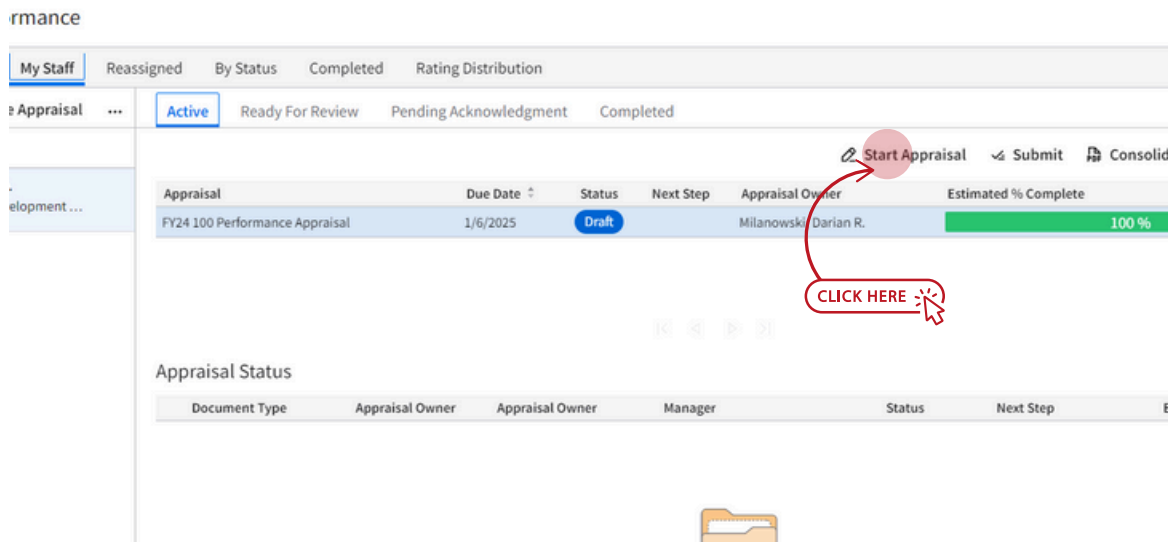
SELECT THE EMPLOYEE AND CLICK ON START APPRAISAL

Diagram 2 : Employee Appraisal Launch Page

SCAN CODE FOR MORE INFORMATION AND TO WATCH AN INSTRUCTIONAL VIDEO
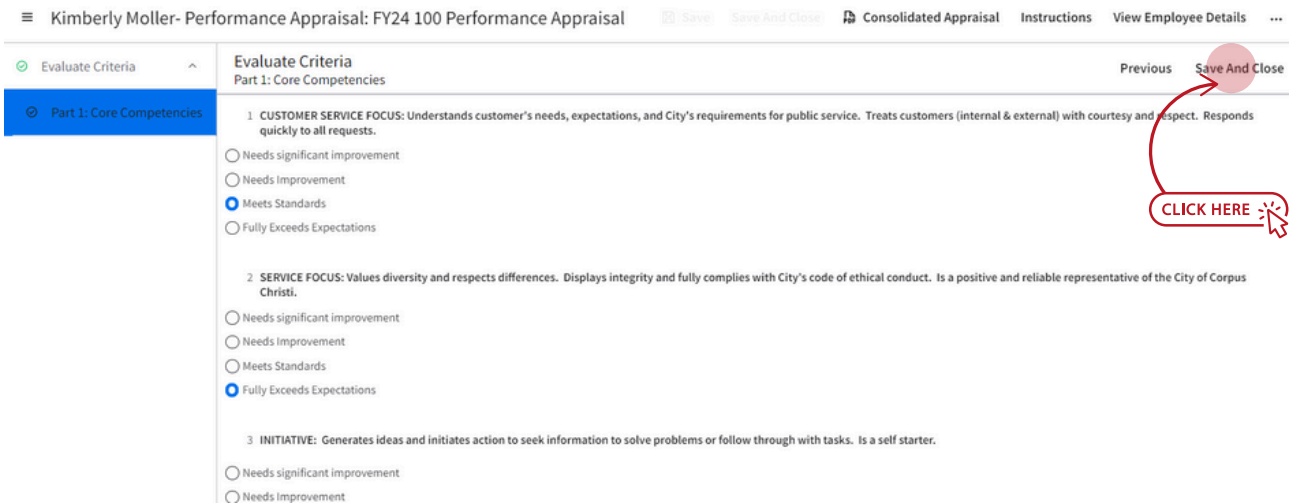
VERIFY ALL INFORMATION IS CORRECT AND THEN CLICK "SAVE AND CLOSE"

Diagram 3 : Employee Appraisal Screen
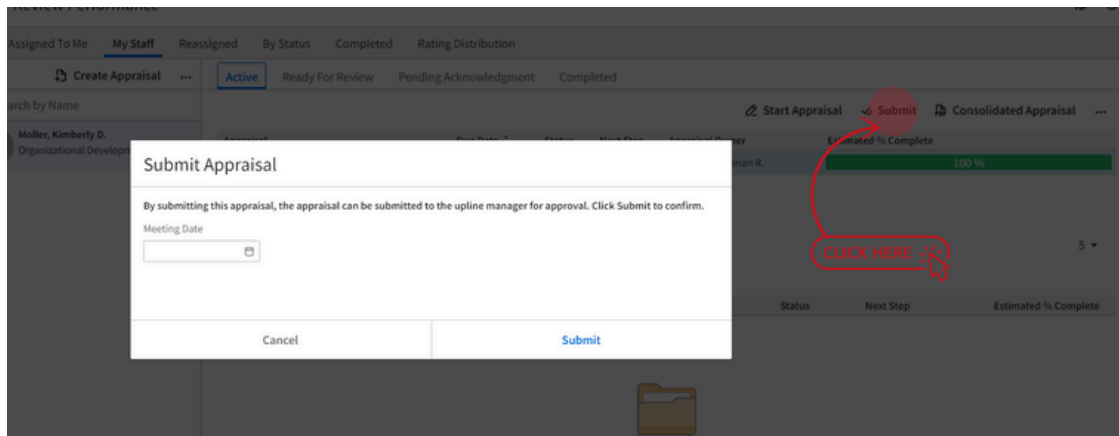
CLICK ON SUBMIT AND THEN ENTER IN TODAY'S TODAY.

Diagram 4 : Submit Appraisal Process

SCAN CODE FOR MORE INFORMATION AND TO WATCH AN INSTRUCTIONAL VIDEO

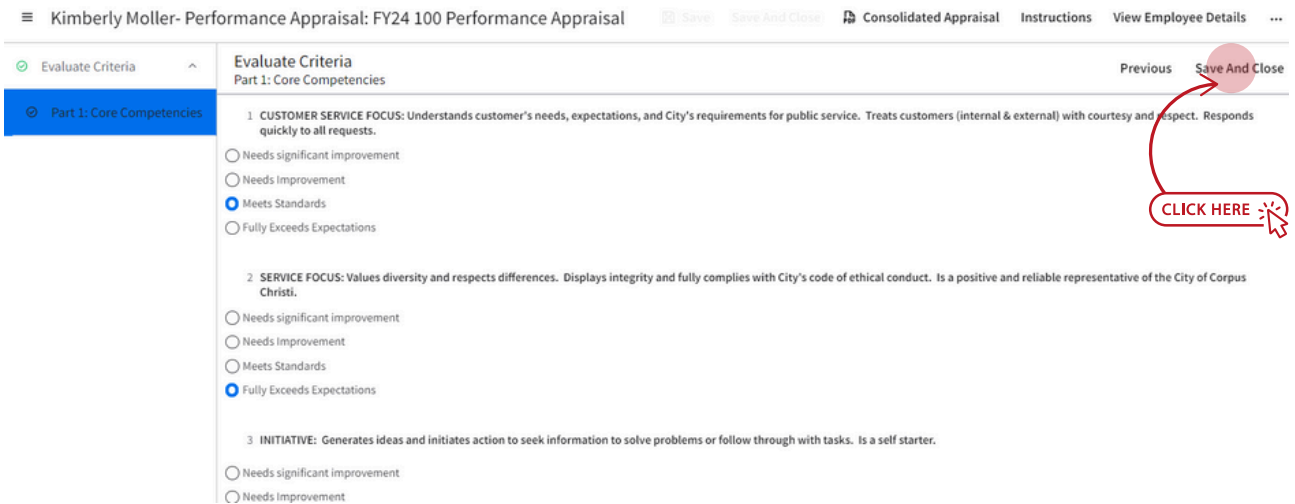## VERIFY ALL INFORMATION IS CORRECT AND THEN CLICK "SAVE AND CLOSE"

Diagram 5 : Employee Appraisal Screen
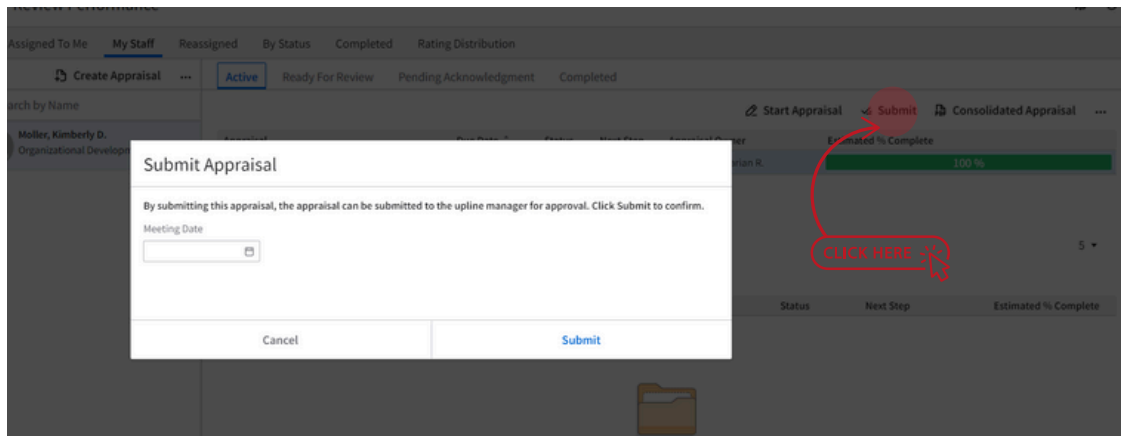
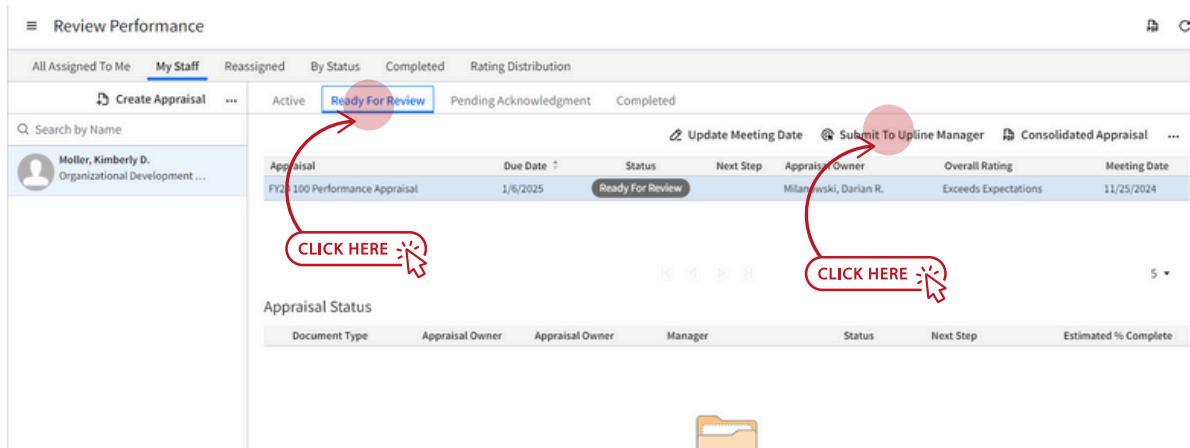## CLICK ON SUBMIT AND THEN ENTER IN TODAY'S TODAY.

Diagram 6 : Submit Appraisal Process

SCAN CODE FOR MORE INFORMATION AND TO WATCH AN INSTRUCTIONAL VIDEO

CLICK ON "READY TO REVIEW" AND THEN CLICK ON "SUBMIT TO UPLINE MANAGER" BUTTON.

Diagram 7 : Ready for Review Tab

PLEASE NOTIFY YOUR MANAGER YOU HAVE SUBMITTED FOR UPLINE APPROVAL.

THEY WILL NOT BE NOTIFIED VIA EMAIL.

SCAN CODE FOR MORE INFORMATION AND TO WATCH AN INSTRUCTIONAL VIDEO

USE THESE INSTRUCTIONS FOR UPLINE APPROVAL

DO YOU MANAGE THE MANAGERS? WELCOME TO UPLINE APPROVALS.
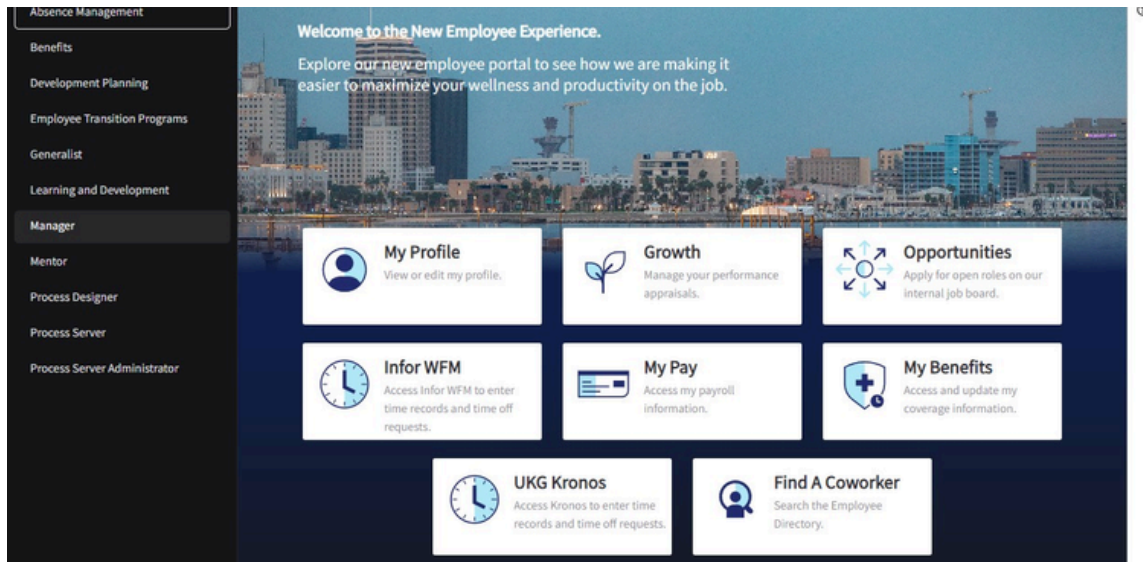
UPLINE APPROVAL GUIDE

If you do not have direct reports who are managers, please skip.

FIRST STEP: LOGIN INTO INFOR

Diagram 1 : Infor Landing Page

CLICK ON "EMPLOYEE"

Diagram 2 : Left Hand Bar Dropdown

SCAN CODE TO GO TO LEARNINGCC.ORG/PERFORM
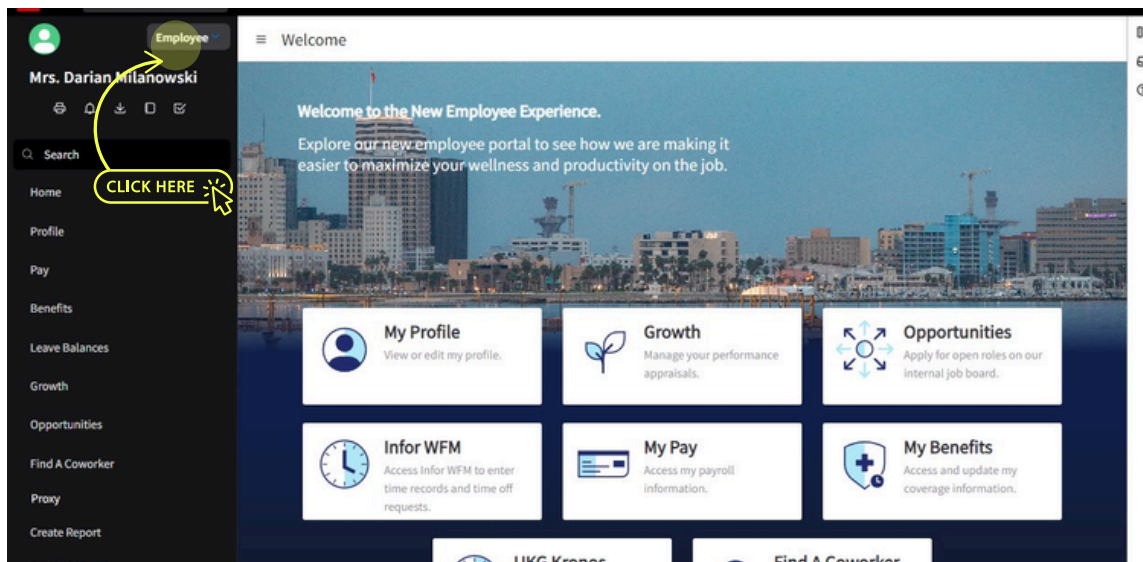
ON YOUR DROPDOWN MENU, CLICK ON "MANAGER"

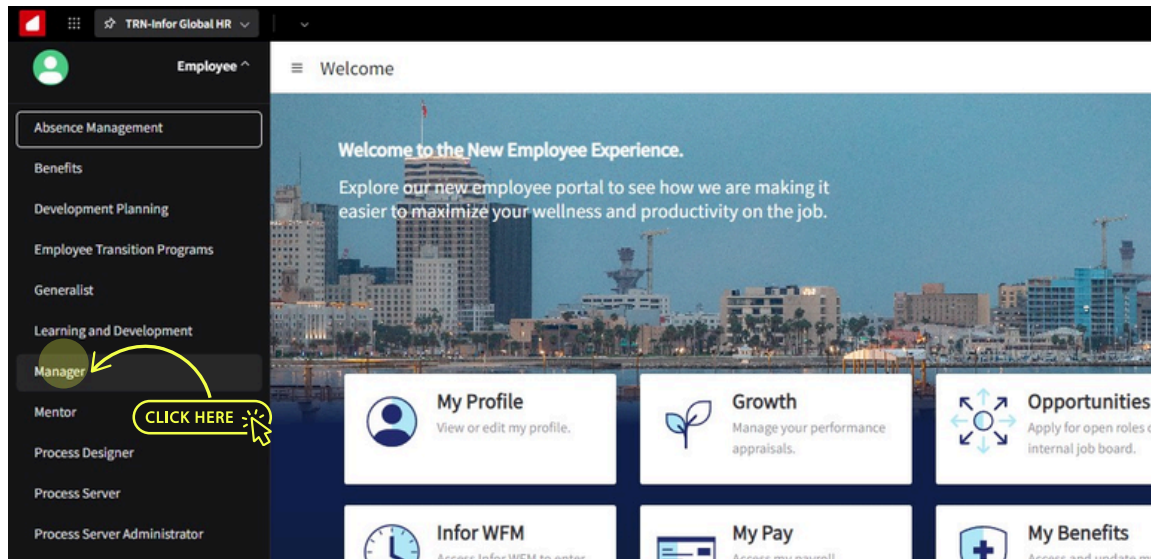**Diagram 3 : Left-Bar Dropdown Menu**
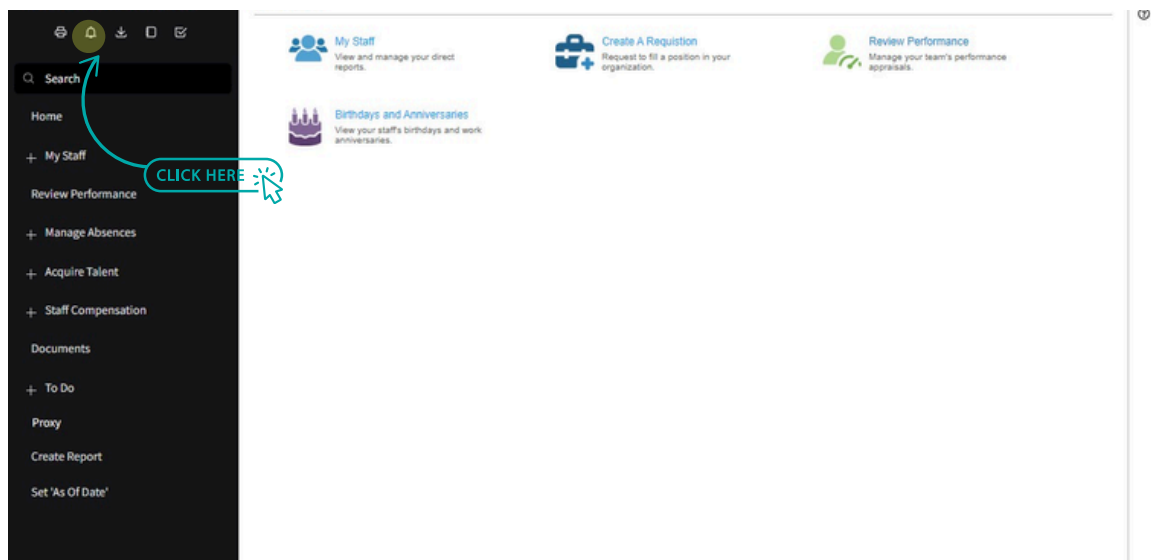
CLICK ON "NOTIFICATIONS"

Diagram 4 : Manager Space

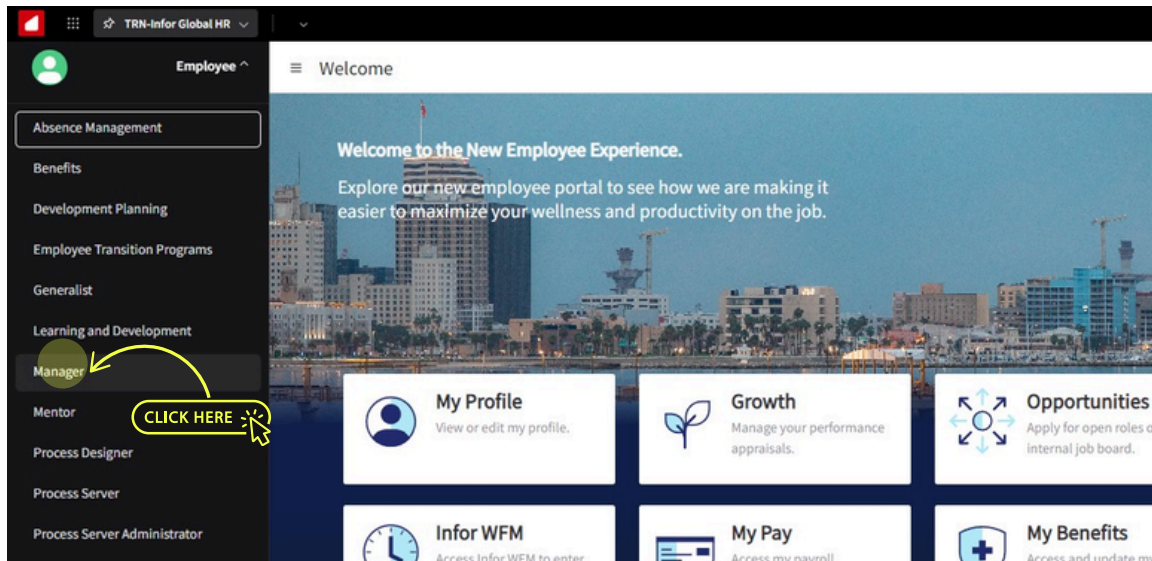# ON YOUR DROPDOWN MENU, CLICK ON "MANAGER"

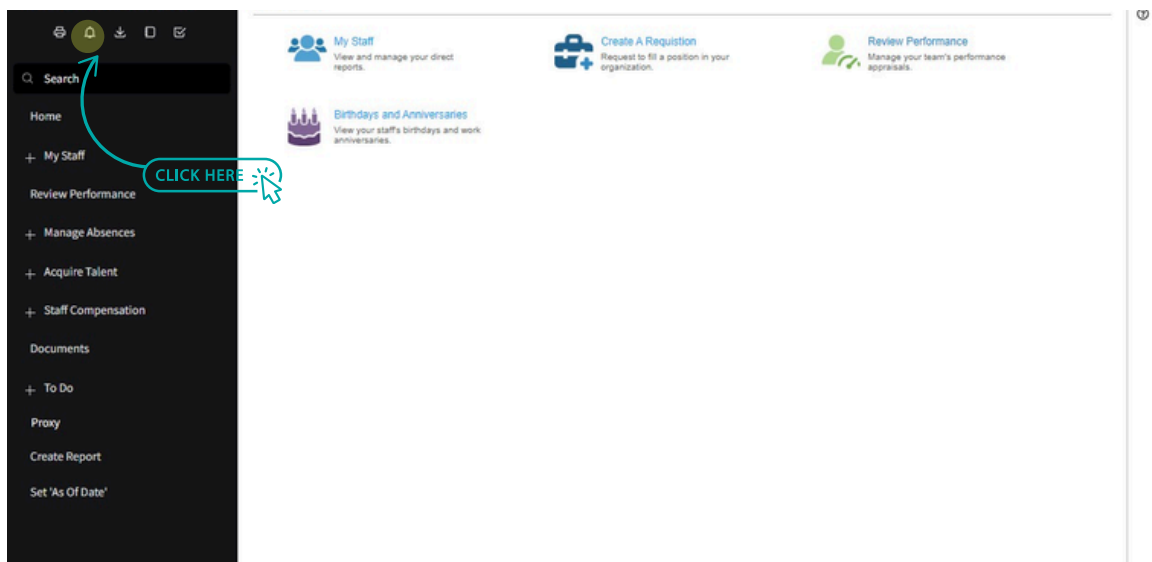**Diagram 5 : Left-Bar Dropdown Menu**

CLICK ON "NOTIFICATIONS"

Diagram 6 : Manager Space

IF APPROVED, YOU MAY CLICK APPROVE. IF NOT, PLEASE REJECT.

23-September 3... ✓ Approve ☒ Reject ...

CLICK HERE

Diagram 7 : Upline Approval Screen Part 2

THE APPRAISAL WILL GO BACK TO THE MANAGER FOR CORRECTION IF REJECTED.

IF APPROVED, IT WILL GO BACK TO THE MANAGER SO THEY CAN HAVE THE EMPLOYEE ACKNOWLEDGE.

ALL APPRAISALS - FINAL STEPS

FINAL STEPS FOR BOTH NEW & CONTINUING APPRAISALS

AFTER MEETING WITH EMPLOYEE, MANAGER WILL SUBMIT APPRAISAL TO EMPLOYEE FOR SIGNATURE
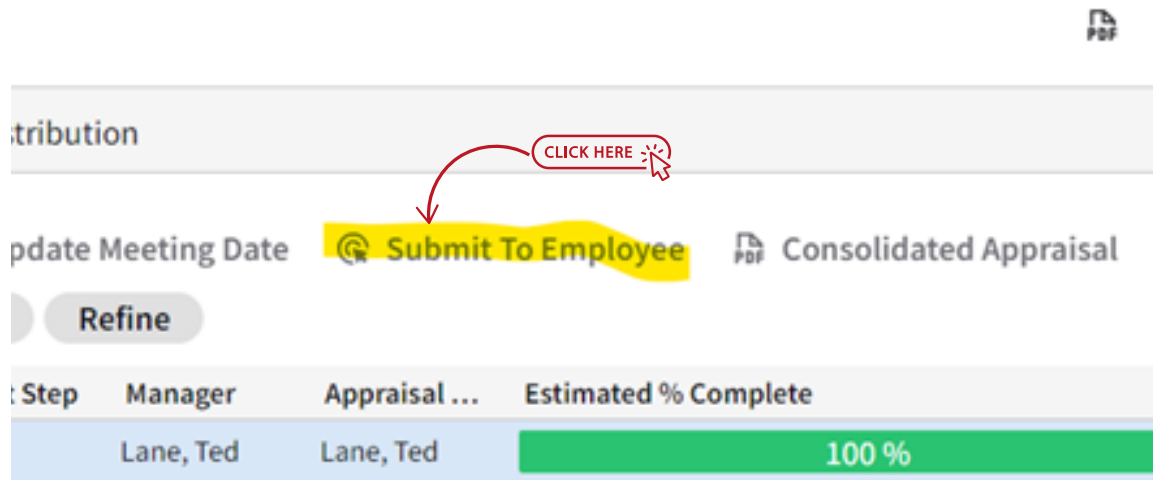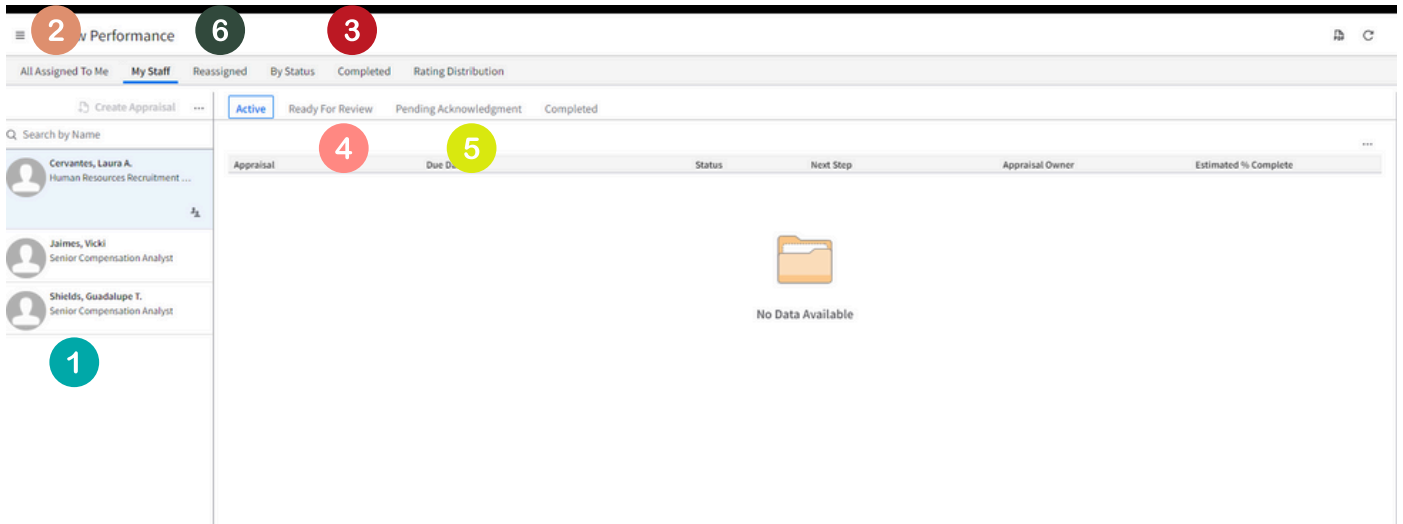

Diagram 1 : Submit to Employee

AFTER EMPLOYEE SUBMITS THEIR COMMENTS AND ACKNOWLEDGEMENT: THE MANAGER WILL RECEIVE THE EMPLOYEE'S ACKNOWLEDGEMENT AND COMMENTS IN THEIR INBOX FOR A FINAL ACKNOWLEDGEMENT AND COMMENTS.

APPENDIX 1

1	Left Bar: View by Team Member		4	View all Appraisals Ready for Review

2	View all Appraisals Assigned to You		5	View All Appraisals Pending Acknowledgment

3	View all Completed Appraisals Assigned to You		6	View all Appraisals that have been Reassigned
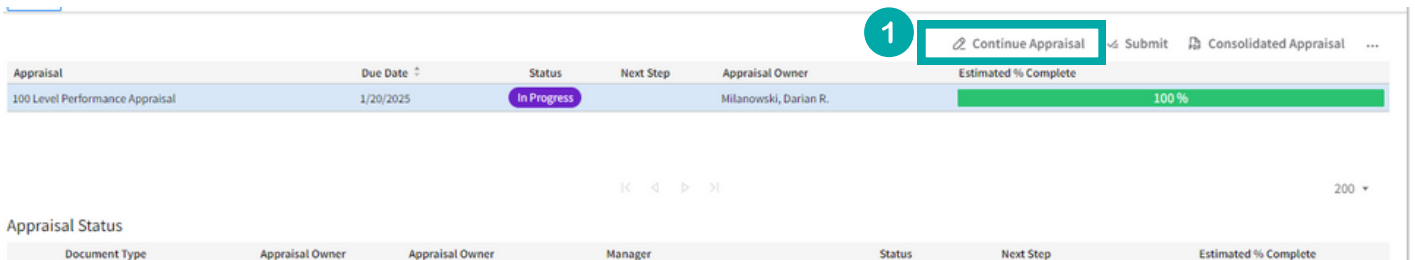
1	Click here to view Appraisal. It will download as a PDF.

Overall Calculated Scores

Section		Score	Weight
Part 1: Core Competencies		2.44	100.00

Overall Score: 2.44

Overall Rating: 2 - Needs Improvement

At the bottom of the last page, you will see an Overall Score.

It will display the score per section. The raw score and then the rounded score with the final rating.