

This QuickStart guide is intended for staff using the PrismHR Talent Management system. This guide teaches you how to manage appraisals from the Performance Management module of PrismHR Talent Management.

Logging In

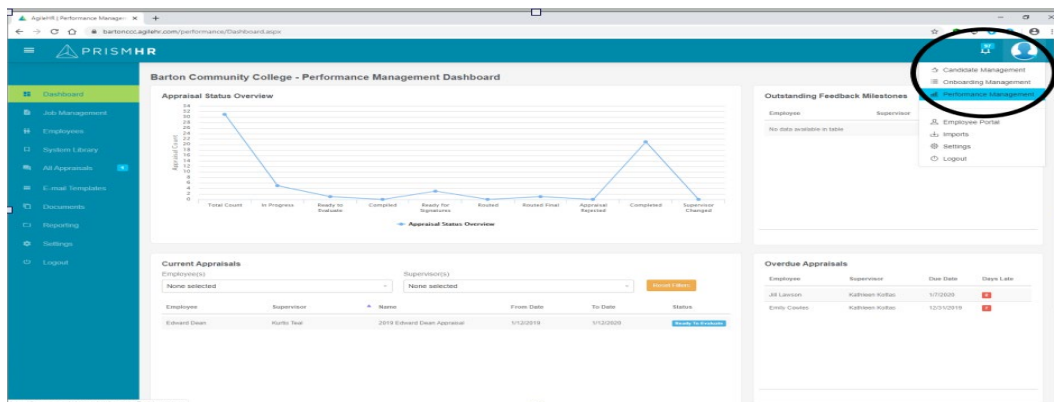
To access the site, go to bartonccc.agilehr.com (this link is not on our web site and single sign-on through the portal is currently not available). There will also be a link within the DoNotReply@agilehr.com system notifications to send you directly to the site.

Your username and password will both be your Barton e-mail address unless the system has been accessed before and the password changed. If you are logging in for the first time, please be sure to update your password to a secure password by clicking on the icon in the top right-hand corner, select settings, user settings and then select the change password button.

Accessing Appraisals

To access Performance Management system:

1. Click on the silhouette or your picture in the upper right corner.
2. Select Performance Management.



To access employee appraisals:

1. Click **My Appraisals** on the left hand side of the screen.
2. Click on your appraisal that is ready to evaluate.
3. The appraisal will have different statuses throughout the process. The statuses, and their definitions are shown below.

Appraisal Status

In Progress	Appraisal structure is being built (Employee and any additional appraiser assigned do not have access to review)
Ready to Evaluate	Appraisals that are ready for evaluation (Email's have been sent out, all assigned to the appraisal have access)
Compiled	Supervisor and employee appraisals that have been merged into a single appraisal
Routed	Appraisals that have been routed for approval
Routed Final	Appraisals that have been routed for final approval
Appraisal Rejected	Appraisals that have been rejected by the approver
Ready for Signatures	Appraisals that are finalized and ready for all participants to sign electronically
Completed	Appraisals where all evaluations and approvals have been completed

Evaluating an Appraisal

To evaluate your appraisal:

1. Click into each tab of the review (there are six of them which are shown in the red boxes below) and then click into each item within the tab. The dot changes from orange to green when the employee and the supervisor have both completed the section

Appraisal Detail

Employee Instructions

2020 Tina Strickland Staff Evaluation Test Print Options Finalize

Employee: Tina Strickland Supervisor: Brian Howe Date Range: 2/18/2020 - 2/18/2021
 Job Title: Human Resources Assistant Hire Date: 2/18/2019 Appraisal Status: Ready To Evaluate

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Themes Mission Connection Goals Appraisal Notes Appraisal Summary Appraisal Documents

- When in the Themes tab, click on the first theme. This will bring up the Edit Themes screen. Once you are in this screen, you can work your way through all of the themes by clicking on the **Save** and **Next** buttons in the top right-hand corner.

Edit Themes < Prev Next > Close Save

Definition

Title: Creativity, Problem Solving and Decision Making
 Weight: 20

Description:

Subject Matter Mastery:

- Identifies, assesses and evaluates challenges, generates creative work-related ideas, and decides on logical and realistic solutions
- Identifies issues, considers alternative ideas, and takes appropriate action before the problem becomes critical

- You are encouraged to leave **Feedback** on each **Theme**. To do so, enter the **Feedback** in the **Feedback** box.

Edit Themes < Prev Next > Close Save

Definition

Title: Creativity, Problem Solving and Decision Making
 Weight: 20

Description:

Subject Matter Mastery:

- Identifies, assesses and evaluates challenges, generates creative work-related ideas, and decides on logical and realistic solutions
- Identifies issues, considers alternative ideas, and takes appropriate action before the problem becomes critical

Feedback Add Feedback Coaching

Date: 05/05/2020 Print on Appraisal Send to Employee

Feedback:

Evaluations

Supervisor Employee

Main Evaluation: *Incomplete*

0.00 1.00 2.00 3.00 4.00 5.00

Not Yet Evaluated

- The system defaults to **Print on Appraisal**. Please ensure this is selected. Selecting **Send to Supervisor** will send an e-mail to the supervisor notifying them each time an appraisal item is completed (this is not recommended).

Feedback Add Feedback Coaching

Date: 02/26/2020 Print on Appraisal Send to Supervisor

Feedback: *

B *I* U 14 **A** **T!**

Type your comments here.

- Read the theme **Definition** description at the top of the screen and then drag the slider bar to evaluate your performance. There is a 5-point scale with 1 being the lowest and 5 being the highest. The definitions of each of the ratings is shown as you move the slider from left to right. Click the **Save** button at the top right hand of the screen after completing your comments and rating on each theme before moving to the next.

Edit Themes < Prev Next > X Close Save

Definition

Title: Creativity, Problem Solving and Decision Making

Weight: 20

Description:

B *I* U 14 **A** **T!**

Subject Matter Mastery:

- Identifies, assesses and evaluates challenges, generates creative work-related ideas, and decides on logical and realistic solutions
- Identifies issues, considers alternative ideas, and takes appropriate action before the problem becomes critical
- Recommends innovative approaches to challenges
- Uses professional expertise and job knowledge to generate the best processes to streamline tasks and responsibilities
- Evaluates the quality of decisions and makes changes as necessary
- Willingly accepts full accountability and responsibility for actions and work

Main Evaluation: *Incomplete*

0.00 1.00 2.00 3.00 4.00 5.00

Not Yet Evaluated

Mission Connection

1. You will be asked the following question, “What do you feel you contribute to make an impact on the College’s Mission?” To provide a response click on the **Description** and enter information in the **Feedback** box.

Reviewing Goals

To review goals on an appraisal:

1. Click the **Goals** tab.
2. Click on the **Add** button.

Current Goals Future Goals

Current Goals Add

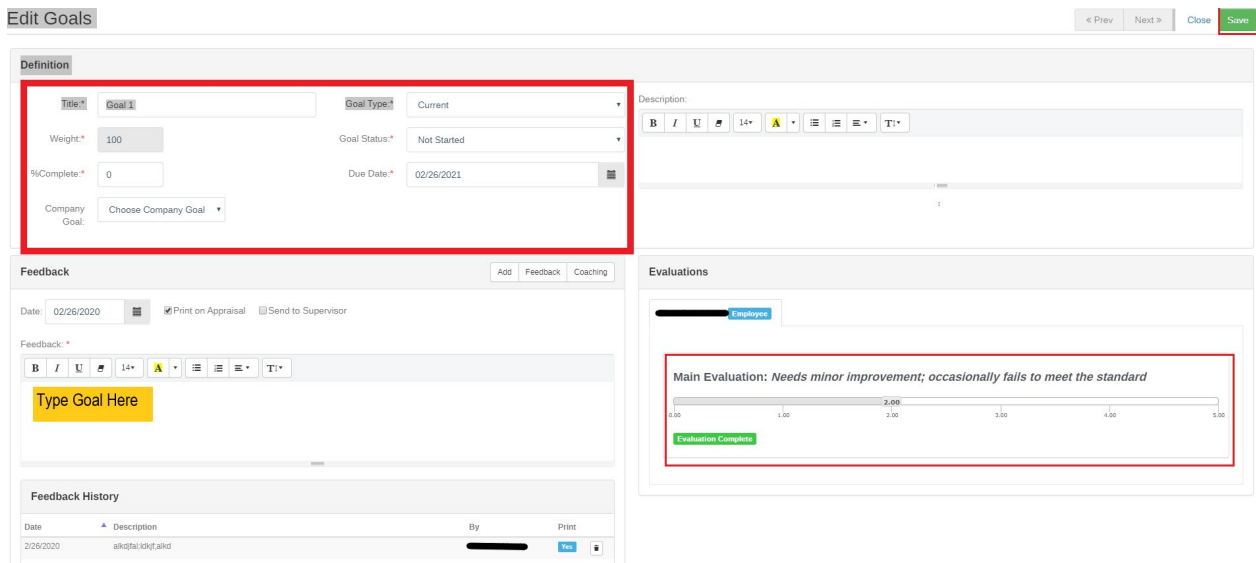
Please add at least one goal. Additional goals can be added if desired. You can designate either short-term or long-term goals. Short-term goals can be obtained within a 12 month period. Long-term goals will be obtained outside of a 12 month period.

Weight	Description	Due Date	Status	Evaluation	Delete
No data available in table					

Weighted At: 0.00 of 100.00%

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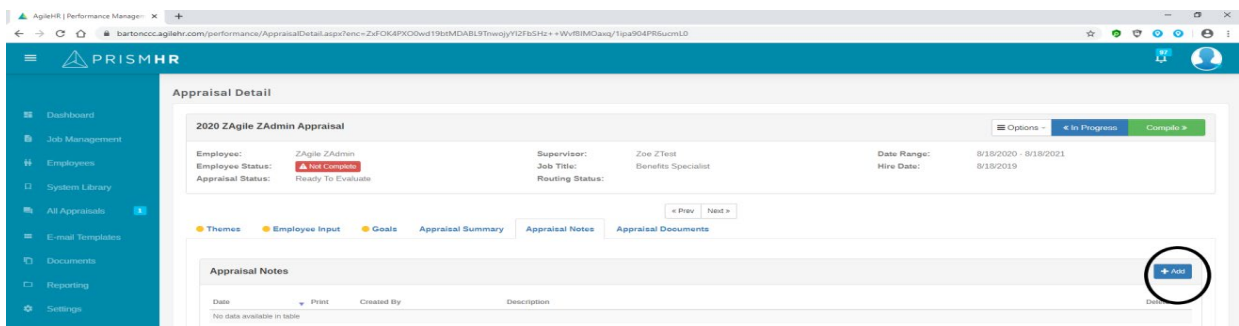
2. Under **Definition** add:
 - Title
 - Goal Type
 - Weight (100%)
 - Goal Status
 - % Complete
 - Due Date
3. Type your goal in the **Feedback** box.
4. Rank the goal in the **Evaluations** box.
5. Click **Save** in the upper right hand corner.
6. Repeat steps 1-7 for all additional goals.



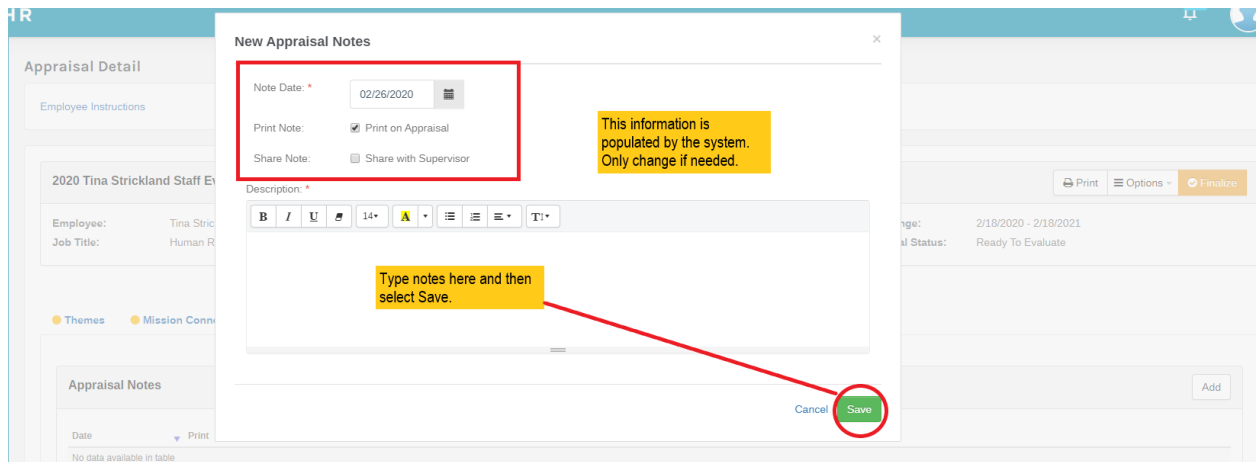
Adding Appraisal Notes (Optional)

To add performance notes to an appraisal:

1. Click the **Performance Notes** tab.
2. Click **Add Performance Note**.



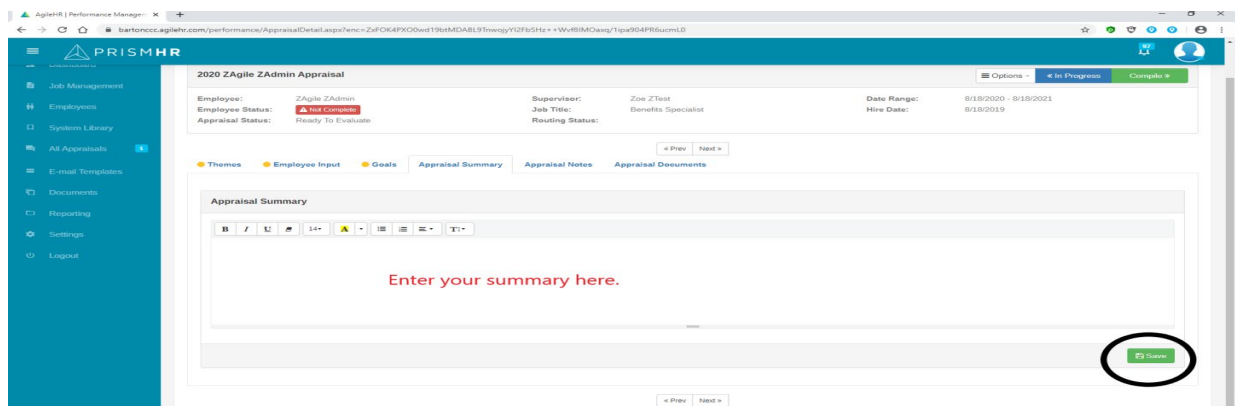
3. The system will populate the **Date**.
4. The system will default to **Print Note**. This is recommended please do not change.
5. Enter a **Description** for the note.
6. Click **Save Note**.



Creating an Appraisal Summary (Optional)

To enter an appraisal summary:

1. Click the **Appraisal Summary** tab.
1. Click **Add**. The New Appraisal Summary form opens.
2. Enter a **Note Date** and **Description**.
3. Select **Print on Appraisal** and/or **Share with Supervisor** if you want to share the summary with the supervisor. *It is recommended that you always select Print on Appraisal. Sharing with your supervisor will send it to them immediately for each item completed and saved.*
4. Click **Save**



Reviewing Documents (Optional)

To review appraisal documents:

1. Click the **Appraisal Documents** tab.
2. Click **Add**. The New Document form opens.
3. Select a **Resource Type**, if desired.
4. Click **Choose File** and navigate to the document.
5. Click **Open**.
6. Select **View on Report** if you want the document to attach to the final appraisal.
7. Click **Save**.

Note: Documents will typically be uploaded by the Supervisor. However, an employee can utilize this if they have received “Kudos” they would like to share, training certificates, or any other document pertaining to the appraisal period.

Note: The following file types may be uploaded: .doc, .docx, .pdf, .xls, .xlsx.

Finishing the Appraisal

1. Click **Finalize** to route your final self-appraisal to your Supervisor.

The screenshot shows the '2020 Tina Strickland Staff Evaluation Test' interface. At the top right, there are three buttons: 'Print', 'Options', and 'Finalize'. The 'Finalize' button is highlighted with a red border. Below the buttons, there is a table with employee and supervisor information. At the bottom, there are several tabs: 'Themes', 'Mission Connection', 'Goals', 'Appraisal Notes', 'Appraisal Summary', and 'Appraisal Documents'. The 'Goals' tab is currently selected.

Employee:	Tina Strickland	Supervisor:	Brian Howe	Date Range:	2/18/2020 - 2/18/2021
Job Title:	Human Resources Assistant	Hire Date:	2/18/2019	Appraisal Status:	Ready To Evaluate

2. Click **Print** if you want to view the appraisal report.

This screenshot is identical to the previous one, but the 'Print' button at the top right is now highlighted with a red border, indicating the next step in the process.

3. Your supervisor and approver will need to complete their portions of the appraisal approval process. Once they are finished, you will have your face-to-face meeting.
4. Once the face-to-face meeting is finished, your supervisor will initiate the signatures and you will receive an email. You will sign into the system and click the **Ready to Signatures** button.

View My Appraisal

Use this screen to provide feedback and evaluation for your own appraisal.

Search

Appraisal Date	Appraisal Name	Supervisor	Appraisal Status
2/18/2020 - 2/18/2021	2020 Tina Strickland Staff Evaluation	Brian Howe	Ready For Signature

- The **Sign Appraisal** box will pop up as soon as you click on your appraisal.

Sign Appraisal ✕

Protest Appraisal

I Disagree with Appraisal Contents and am Protesting the Appraisal

Reason for Protesting Appraisal:

Signature

Please review the final appraisal report. When you are done, please read the disclaimer below and sign to complete the appraisal.

DISCLAIMER STATEMENT: Signature indicates that the performance appraisal has been read and discussed with me. Signature does not necessarily indicate agreement or disagreement with the content of this appraisal.

- Click on the **View Final Appraisal Report** in order to review your complete appraisal.

Sign Appraisal

Protest Appraisal

I Disagree with Appraisal Contents and am Protesting the Appraisal

Reason for Protesting Appraisal:

Signature

Please review the final appraisal report. When you are done, please read the disclaimer below and sign to complete the appraisal.

DISCLAIMER STATEMENT: Signature indicates that the performance appraisal has been read and discussed with me. Signature does not necessarily indicate agreement or disagreement with the content of this appraisal.

7. If you are comfortable with your appraisal, type your name in the **Sign Appraisal** field and click **Sign**.

Sign Appraisal

Protest Appraisal

I Disagree with Appraisal Contents and am Protesting the Appraisal

Reason for Protesting Appraisal:

Signature

Please review the final appraisal report. When you are done, please read the disclaimer below and sign to complete the appraisal.

DISCLAIMER STATEMENT: Signature indicates that the performance appraisal has been read and discussed with me. Signature does not necessarily indicate agreement or disagreement with the content of this appraisal.

- If you disagree with your appraisal you have the option to sign under protest. On the left side of the **Signature Appraisal** box is a **Protest Appraisal** option. To protest click the box to the left of the disagree statement. Type your protest comments in the **Reason for Protesting Appraisal** box and click the **Protest** button. To clear comments, click the **Clear Protest** button. You must then sign the appraisal.

Sign Appraisal ✕

Protest Appraisal

I Disagree with Appraisal Contents and am Protesting the Appraisal

Reason for Protesting Appraisal:

Type Protest Comments Here

Signature

Please review the final appraisal report. When you are done, please read the disclaimer below and sign to complete the appraisal.

DISCLAIMER STATEMENT: Signature indicates that the performance appraisal has been read and discussed with me. Signature does not necessarily indicate agreement or disagreement with the content of this appraisal.

- Click **Submit Signature**. The appraisal is now finalized.

Appraisal Detail

2020 Tina Strickland Staff Evaluation Print Options **Sign**

Employee:	Tina Strickland	Supervisor:	Brian Howe	Date Range:	2/18/2020 - 2/18/2021
Job Title:	Human Resources Assistant	Hire Date:	2/18/2019	Appraisal Status:	Ready for Signatures

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Auto Create New Appraisal

The system will automatically create a new appraisal upon finalizing the employee’s current appraisal. This appraisal is automatically set to **Evaluate**.

Use of the new Appraisal to document goal progression:

- The supervisor and employee will receive initial notification that this appraisal is open. However, no further notification will be sent until one month prior to the appraisals due date.

2. Nothing needs to be done with this appraisal upon receiving the aforementioned notification.
3. If your supervisor selected the **Copy to Future** option in the **Goals** tab for any of the goals in the previous appraisal, they will appear in the **Goals** tab in the new appraisal.
4. The employee and supervisor will then be able to show progression in these goals.