

This Quickstart guide is intended for staff employee supervisors 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

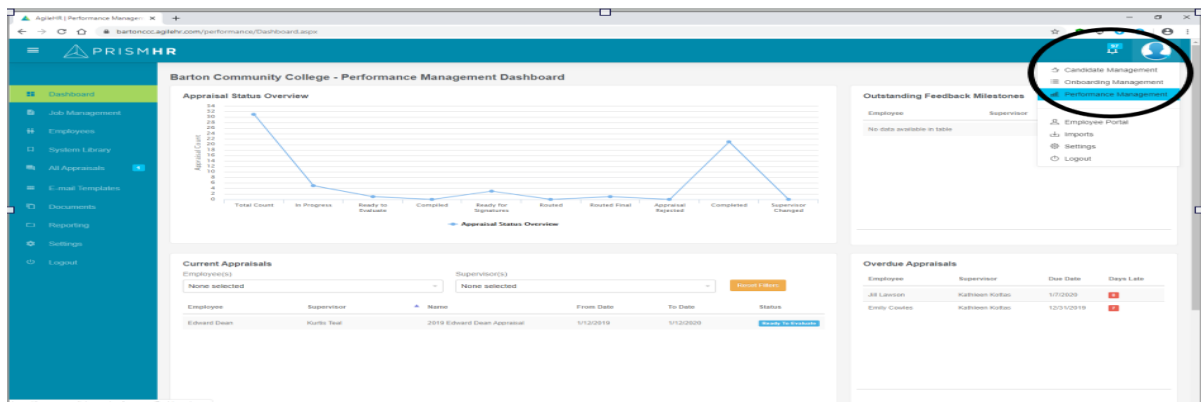
To access the site, go to bartonccc.agilehr.com (this link is not on our web site and single sign-on through the portal is currently not available). There will also be a link within the DoNotReply@agilehr.com system notifications to send you directly to the site.

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 **All Appraisals** on the main menu on the left-hand side of the screen. The Manage Performance Appraisals screen opens.
2. HR has already created the employee's appraisal. To pull it up, type the employees name in the **Search** box and click **Enter**. **You will receive notification from the system when your employee has completed their self-evaluation. You will conduct your appraisal after receiving this notification.**



3. Click on the employee's name and it will bring up the appraisal.
4. 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 an employee appraisal:

1. Make sure you are in the appraisal that you wish to work on.
2. The appraisal status will be **Ready to Evaluate**.
3. 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 on the Themes and Goals tabs when the employee and the supervisor have both completed the section. The Mission Connection tab will remain orange because it is a feedback only tab.

Appraisal Detail

Options ▾
Finalize
◀ In Progress
Compile ▶

Employee:		Supervisor:		Date Range:	2/3/2020 - 5/3/2020
Employee Status:	⚠ Not Complete	Job Title:		Hire Date:	2/3/2020
Routing Status:				Appraisal Status:	Ready To Evaluate

< Prev Next >

● Themes

● Mission Connection

● Goals

Appraisal Notes

Appraisal Summary

Appraisal Documents

4. 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. **DO NOT** click on the employee's comments on the Feedback tab or this will delete their comments. You can view their full comments in the Feedback History section.

5. You are encouraged to leave Feedback for each theme. To do so, enter it in the **Feedback** box and select **Print on Appraisal**. If you want the employee to see the feedback immediately, click on the **Send to Employee** box otherwise leave it unchecked.

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

- Please ensure that the employee's comments are marked to **Print on Appraisal** as illustrated above.

Feedback + New Feedback Coaching

Date: 02/21/2020

Print on Appraisal Send to Employee

Feedback: *

- Read the theme **Definition** description at the top of the screen and then drag the slider bar to evaluate the employee's 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.

Edit Themes < Prev Next > Close Save

Definition

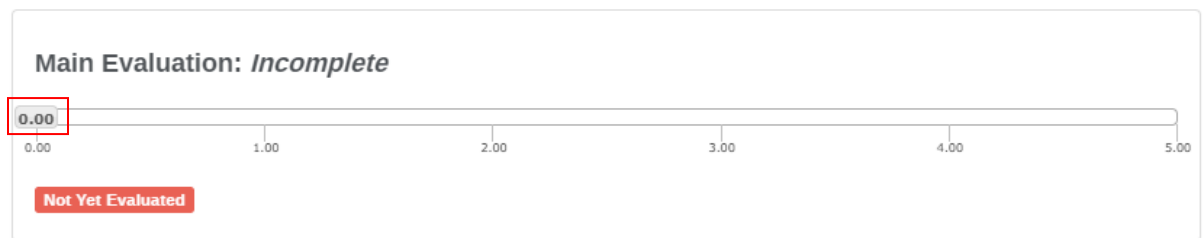
Title: Creativity, Problem Solving and Decision Making

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
- 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



Mission Connection

1. Before you begin, make sure the employee has responded to the question, “What do you feel you contribute to make an impact on the College’s Mission?” To read the employees answer to this question, click on **Description** and review the information in the **Feedback** box. If applicable, also enter your feedback in the **Feedback** box and click **Save**.

Reviewing Goals

To review goals on an appraisal:

1. Click the **Goals** tab. Before you begin, make sure the employee has responded.
2. Click **on the goal you want to review**. If only one goal has been added (the required minimum) the weight will be 100%. If there is more than one goal, the weight will be distributed amongst the goals so that the total weight amount equals 100%.
3. Enter your feedback in the **Feedback** box.
4. If the goal has been completed (shows 100% in the completion box and/or complete in the status tag), evaluate the goal in the **Evaluations** box by moving the slider from left to right. 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.
5. Click **Save**.
6. If the employee’s goal is not complete, click on the **Copy** icon in the main goal overview and select **Yes**. This will **Copy to Future** evaluations. Goals that are copied to the Future tab will populate on the next review as a current goal and will maintain the % of completion from the previous review. This will allow both the employee and supervisor to track the progress of the goal through multiple review cycles. This will also enable reminders to be sent out to the employee and supervisor to check/update the goal status.

Current Goals Future Goals

Current Goals + Add

Weight	Description	Due Date	Status	Evaluation	Self Eval	Copy	Delete
50.00	Goal 1 TBD			0.00 - Not Complete	0.00 - Incomplete		
50.00	Goal 2 TBD			0.00 - Not Complete	0.00 - Incomplete		
50.00	Goal 1 Better utilize technology to communicate with students and asses learning.	1/1/2020	Not Started	0.00 - Not Complete	0.00 - Incomplete		
50.00	Goal 2 Improve course structure and course shells.	1/1/2021	Not Started	0.00 - Not Complete	0.00 - Incomplete		
50.00	Course Shell	1/1/2021	In Process	0.00 - Not Complete	0.00 - Incomplete		
50.00	Course Shell	1/1/2021	Not Started	0.00 - Not Complete	0.00 - Incomplete		

Weighted At: 300.00 of 100.00% Supervisor Rating: 0.00 - N/A

Adding Appraisal Notes (Optional)

To add performance notes to an appraisal:

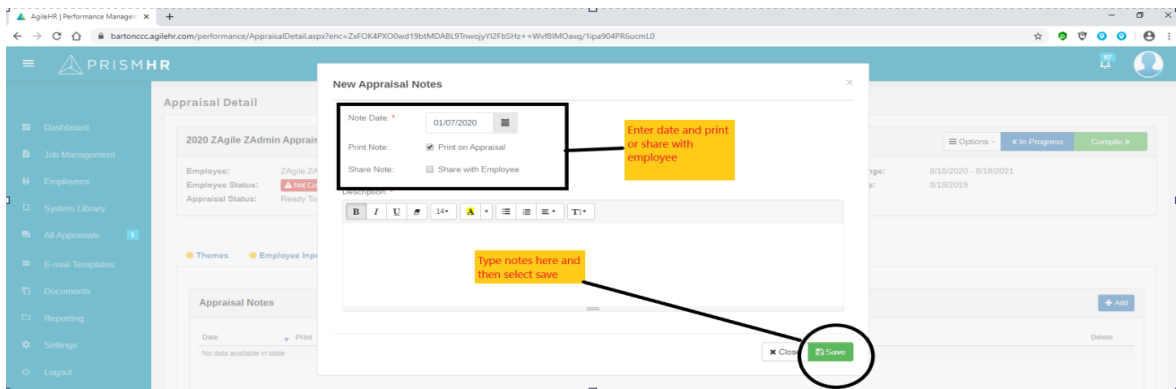
1. Click the **Appraisal Notes** tab.
2. Click **Add**.

Appraisal Documents

Appraisal Notes + Add

Date	Print	Created By	Description	Delete
No data available in table				

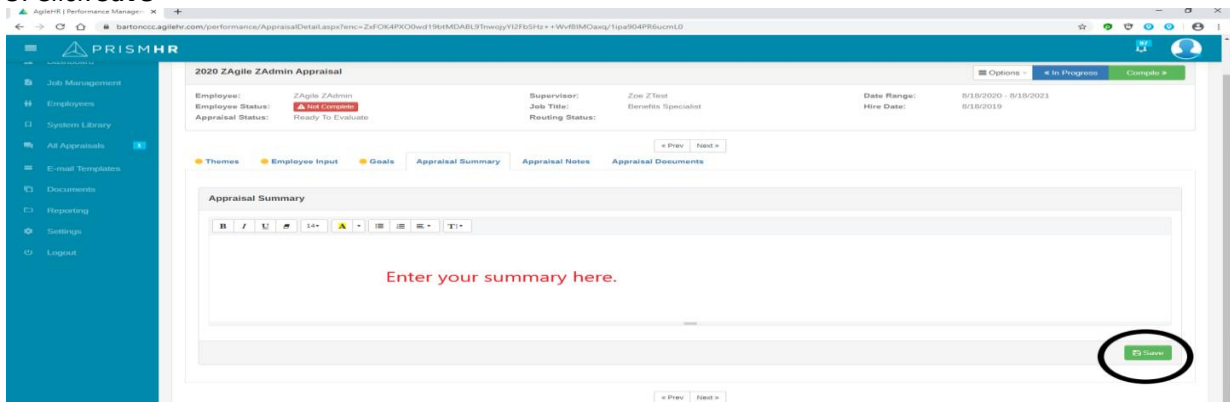
3. Enter a **Note Date**.
4. Select **Print Note** if you want the note to print on the appraisal.
5. Select **Share with Employee** if you want to share the note with the employee.
6. Enter a **Description** for the note.
7. Click **Save**.



Creating an Appraisal Summary (Optional)

To enter an appraisal summary:

1. Click the **Appraisal Summary** tab.
2. Click **Add**. The New Appraisal Summary form opens.
3. Enter a **Note Date** and **Description**.
4. Select **Print on Appraisal** and/or **Share with Employee** if you want to share the summary with the employee immediately.
5. Click **Save**



Reviewing/Uploading Documents (Optional)

To upload an appraisal document:

1. Click the **Appraisal Documents** tab.
2. To add a document, click **Add**. The New Document form opens.
3. Select a **Resource Type**, if desired.

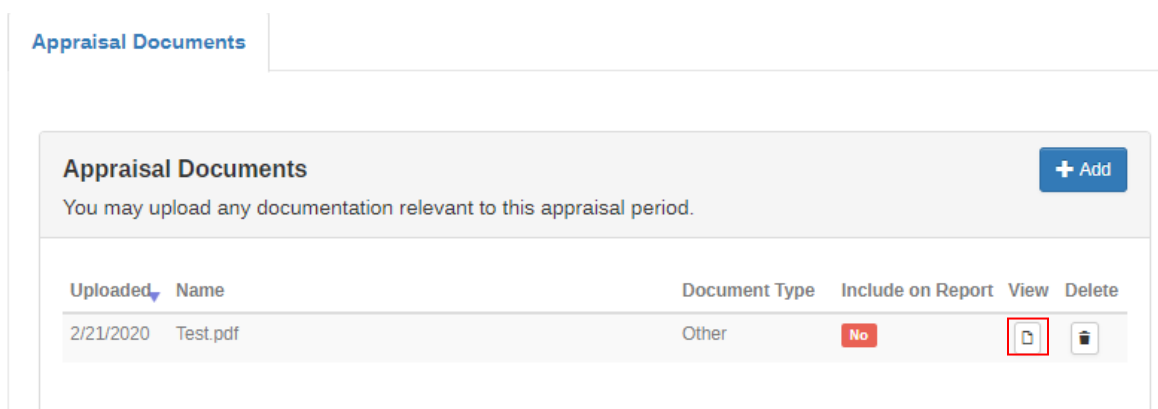
4. Select Include on **Final Appraisal Report** if you want the document to be included on the final report.
5. Click **Choose File** and navigate to the document.
6. Click **Open**.
7. Click **Save**.

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

Additional Note: You may upload any documentation relevant to this appraisal period.

To review an appraisal document:

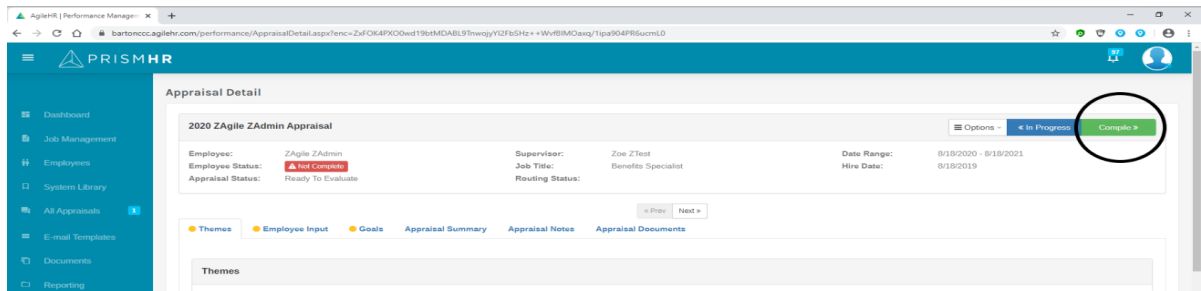
1. Click on the **View** icon for the applicable appraisal document.



Finishing the Appraisal

To finalize the employee appraisal:

1. Click the orange **Finalize** button in the appraisal header. A screen will pop up. Scroll to the bottom of that screen and click the **Finalize** button located at the bottom right hand of that screen.
2. Click **Compile** in the appraisal header. A checklist is displayed to ensure that you have completed everything on the appraisal.



3. Click **View Draft Report** if you want to view the appraisal report.
4. Click **Compile** to merge the employee and supervisor appraisals (this step must be completed even if the employee was not required to complete a self-evaluation).
5. Click **Routed** to route the appraisal to the approvers. The only time this will not be necessary is if a Vice President is the appraiser.
6. To check the routing status of an appraisal, open up the appraisal and click **Approval** in the **Options** tab. Once it has gone through the approval process, the **Signatures** tab will display.
7. Click Reports in the **Options** tab and download the **Final Appraisal Summary**. You will go over this summary during the face-to-face meeting with the employee.
8. Once the face-to-face meeting has been held, the appraisal is ready for signing, by both you and your employee. Please have the employee sign the appraisal first then you will sign.
9. To sign you will click the **Signatures** tab.
10. Type your name and click **Sign**.
11. Click **Submit Signature**.
12. Click **Complete** to finalize the appraisal.

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:

1. 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. If you 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.
3. The employee and supervisor will then be able to show progression in these goals.
4. **Do not delete this appraisal once it is created.**

Extended Appraisal Cycle:

If the employee will go three years in between appraisals:

1. Notify HR so that the end date can be changed to reflect the correct appraisal period.
2. You may still follow the instructions above to work on goals and set new goals for the appraisal period. All goals will need to be documented in the appraisal so that the success of the goal can be evaluated at the end of the appraisal period.