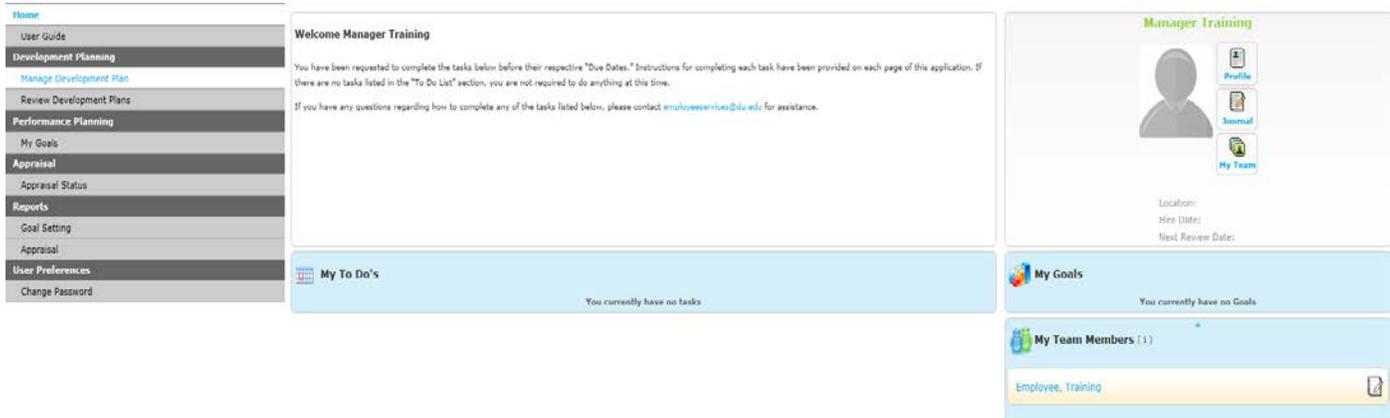## Logging In

1. Log into PioneerWeb

2. Under Employee tab, expand Performance Management folder, then choose **Performance System Login**

3. Enter your DU Email address and PioneerWeb password

4. **Tip**: If you need to reset your password, call the UTS Helpdesk at 1-4700

From your Home Page, you can use Performance as both an employee and a supervisor.



## About Appraisals

- Employees should finalize their goal plan and have it approved by their supervisor before completing the self-appraisal. If you need to edit a goal plan that has already been approved, employees simply click "Reopen Plan" from the My goals tab and supervisors click "Reopen Plan" for the selected employee in the "My Team Members" tab.

- Approved goal plans will feed into the final appraisal form.

- The Appraisal form is divided into three areas; each area is weighted to affect the Overall rating.
    1. Job Category – 60% of Overall Rating
    2. Competencies – 20% of Overall Rating
    3. Performance Goals – 20% of Overall Rating

- Instead of the 1-5 scale that we have used in the past, we will be using the following ratings:
  **Exceptional Performance:** Performance that exceeds job requirements and expectations and is consistently exceptional.
  **Exceeds Expectations:** Performance that consistently fulfills the job requirements and exceeds expectations.
  **Solid Performance:** Performance that consistently fulfills the job requirements.
  **Improvement Required:** Performance that does not consistently meet the job requirements.
  **Unacceptable Performance:** Performance that consistently fails to meet the job requirements.

- Job descriptions do not need to be entered into the appraisal form. Use the comment field under Job Knowledge, Performance and Comprehension  to enter text about your performance in the job, not to list a description of the job.

Email questions to PerformanceManagement@du.edu                    Visit www.du.edu/performance

## Self-Appraisal

Employee's will receive an email when it is time to begin writing their self-appraisal.

To start, click the task title – **Employee Writes Appraisal for Self** under the "My To Do's" list**.**

| My To Do's ( 1 ) | Sort Options ▼ |
|---|---|
| Employee Writes Appraisal for self<br>Status: Live and untouched | Due Date: 8/21/2015 |

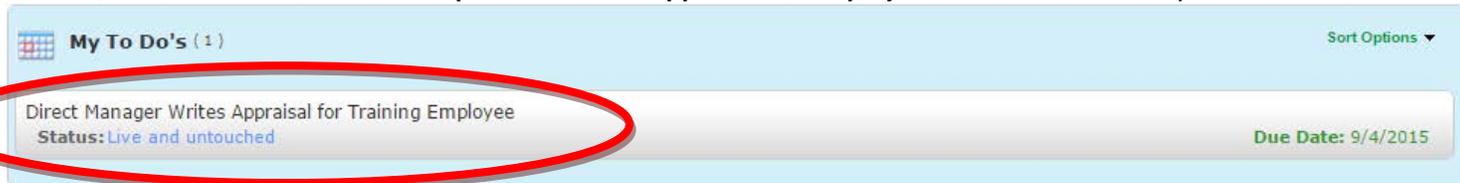Complete the following steps for each area of the Appraisal form:

1.  Choose a Current Performance rating from the drop-down menu
2.  Click on the Comment box to select some phrases appropriate to the level of performance and/or write their own text relevant to the performance (see **How to Use the Writing Assistant**)
3.  Include specific examples from the year that reflect the reason for the rating in the Comment box
4.  When all required fields are completed, click…

    - **Submit** – if you have completed your self-appraisal
    - **Save as Draft** - to continue working on your self-appraisal at another time
    - **Refresh Goals -** if you have made any edits to your goal plan
    - **Calculate Rollup Scores -** to update the appraisal's Overall Rating (at the top of the form)

## DO NOT submit your Self-Appraisal until your goal plan is approved and the goals are showing in the appraisal form!

## Supervisor Appraisal

Supervisors will receive an email when their direct report has completed the self-appraisal step.

To start, click the task title – **Direct Supervisor Writes Appraisal for *Employee Name*** under the "My To Do's" list.

| My To Do's ( 1 ) | Sort Options ▼ |
|---|---|
| Direct Manager Writes Appraisal for Training Employee<br>Status: Live and untouched | Due Date: 9/4/2015 |

Complete the following steps for each area of the Appraisal form:

5.  Choose a Current Performance rating from the drop-down menu
6.  Click on the Comment box to select some phrases appropriate to the level of performance and/or write their own text relevant to the performance (see **How to Use the Writing Assistant**)
7.  Include specific examples from the year that reflect the reason for the rating in the Comment box
8.  When all required fields are completed, click…

    - **Submit**  - if you have completed the appraisal of your direct report
    - **Save as Draft** - to continue working on the appraisal at another time
    - **Calculate Rollup Scores -** to update the appraisal's Overall Rating (at the top of the form)

Email questions to PerformanceManagement@du.edu                    Visit www.du.edu/performance
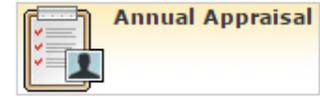
## Optional Step – Secondary Reviewer (only applies to divisions that have chosen to implement it)

Some departments have a Secondary Reviewer look at appraisals and suggest edits.

If you are your department's Secondary Reviewer, you will receive an email when an appraisal is ready for your review.

To start, click the task title – **Secondary Reviewer Reviews Appraisal and Suggests Edits for *Employee Name*** under the "My To Do's" list.

Complete the following steps for each Appraisal form:
1. Click on the Annual Appraisal button on the upper left to view the appraisal.
2. If necessary, type suggested edits into the Feedback field for each area of the form. If no edits are needed, fields can be left blank.
3. When complete, click…
   a. **Submit** – if you are done reviewing the appraisal
   b. **Save as Draft** – to continue working on the review at another time

## Optional Step – Supervisor Makes Edits (only applies to divisions that have chosen to implement it)

When the Secondary Reviewer is done, the supervisor will receive an email and task telling them to make edits (if necessary).

To start, click the task title – **Supervisor Makes Edits for *Employee Name*** under the "My To Do's" list.

Complete the following steps for each Appraisal form:
1. Click on the Feedback button on the upper left to view suggested edits.
2. If necessary, make suggested edits to the appraisal. If no edits are shown, click **Submit** to move the form to the next step.

## Supervisor Schedules Review Meeting

Supervisors will receive an email when it is time to schedule the review meeting with their direct report(s).

Once the meeting has been held, click the task title – **Manage Meeting for *Employee Name*** under the "My To Do's" list.

Complete the following steps for each Employee:
1. Verify the date the meeting was held.
2. Check to show who attended the meeting.
3. Click Save. This is your final sign-off on the Review Meeting and Appraisal.

## Employee Acknowledges Review Meeting & Appraisal

Employees will receive an email after the Review Meeting has been held, asking for acknowledgement of the meeting and final sign-off on the appraisal.

To start, click the task title – **Acknowledge Meeting for Self** under the "My To Do's" list.

**If you agree:** Click Save to acknowledge the Review Meeting was held and provide final sign-off on your Appraisal.

**If you do not agree with either the meeting date or the Appraisal:** select *The information provided above is not correct,* and enter any applicable notes in the Journal field (these notes are private and can only be seen by you). Click Save.

Email questions to PerformanceManagement@du.edu          Visit www.du.edu/performance

## How to Use the Writing Assistant

This is meant to be an optional tool to help employees and supervisors write text for the appraisal. If you do not find it necessary or useful, feel free to skip steps 1-5 and enter your own text and examples in the Comments box.

Populating the Comment field:

1. Click on the **Enter Comment** field.

2. Select one of the reasons associated with the chosen area of the appraisal (Job Knowledge and Comprehension shown as example below).

3. Adjust the Level indicator to represent the appropriate skill level for the selected reason.

4. Select a phrase that you would like included in your comments.

5. Click the add button ✚ to move the phrase into the Comments field.

6. Edit the comments an necessary, add any additional phrases that you would like included and be sure to include specific examples to support the rating. Use Spell Check in the upper right corner to help you!

7. Click Done to return to the Appraisal form.