



Performance Job Aid—Executive Narrative Appraisal



DU email (first.lastname@du.edu)

Password (your PioneerWeb password)

Login

Logging into Performance

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



Navigation Bar

Home—Provides you with a link to your Home page.

Performance Planning—Not used by those completing an Executive Narrative form.*

Appraisal

- **Appraisal Status**—provides you with a link to view the status of an appraisal.

Reports

- **Goal Setting**—Not used by those completing and Executive Narrative form.*
- **Appraisal**—provides you with a link to view Appraisal reports.

User Preferences

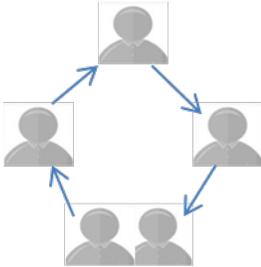
- **Change Password**—provides you with a link to change your password.



My To Do's

Your **To Do** list will include any tasks that you are responsible for completing along with the associated due date and status.*

- **Status**—the current status of the task. A task status provides additional details about the task.
- **Due date**—the date the task is required to be completed. Due dates turn from **green** to **red** as tasks become overdue.



Executive Narrative Appraisal Workflow

Steps in the Executive Narrative Appraisal process within the Performance system:

1. Executive Employee Writes Self-Appraisal
2. Executive Supervisor Writes Appraisal of Executive Employee
3. Executive Supervisor Schedules & Manages Review Meeting with Executive Employee
4. Executive Supervisor Acknowledges Meeting & Signs off on Appraisal.
5. Executive Employee Acknowledges Meeting & Signs off on Appraisal.

Detailed instructions for each step are included on the back



The options in the upper right corner may be used at any time to save, print or view a pdf of the Executive Narrative Appraisal form.

*If you have direct reports that will be completing goal setting and an appraisal form, you will have reports and tasks in your To Do list associated with assigning them goals, reviewing their goal plan and completion of their appraisal. They have no connection to the completion of the Executive Narrative form.

Tips:

- Text can be pasted into both the Comment and Journal fields within this system. If you have kept performance notes in a Word document or emails, you do not need to retype it.

Reach out to your Division Performance Contact or email PerformanceManagement@du.edu with any questions.

Employee Writes Appraisal for Self

Instructions
Provide a detailed assessment of performance during this review period.

Narrative Evaluation *

Enter Comments for the review period

Enter Self-Appraisal text here.

Cancel Print Save as Draft Submit

Step 1: Executive Employee —Writing a Self-Appraisal Narrative

1. A system generated email is sent to notify you of your new task.
2. After you have logged in to the system, you will notice a new task on your **To Do** list.
3. Access your appraisal by clicking on the task in your **To Do** list.
4. Enter your self-appraisal text in the **Comments** field.
5. Choose one of the following options:
Cancel—allows you to close your appraisal without saving changes.
Print—allows you to print the Appraisal form in PDF or HTML format at any time during the process. When you have finished viewing the form, you will need to click on Finished to take you back to the Appraisal form.
Save as Draft—allows you to save your work on the Appraisal form so that you may access the Appraisal form at a later time.
Submit—allows you to save your work and submit the completed appraisal to your supervisor. It is important to remember that you should not submit until you have finalized your self-appraisal. You will receive a confirmation pop-up indicating that your save and submission are complete.

Use the **Appraisal** link under **Reports** in the left hand tool bar to view the form once it is submitted.

Enter Comments for the review period

Enter employee's Appraisal text here.

Step 2: Executive Supervisor —Writing an Employee's Appraisal Narrative

Follow the steps listed above for the Executive Employee. In Step 4, enter the appraisal text for your direct report in the **Comments** field.

Meeting Date

7/6/2015 Add to Calendar

Attended	Required to Sign	Signed Printed Appraisal
<input checked="" type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>		<input type="checkbox"/>

Step 3: Executive Supervisor —Schedule Review Meeting & Sign off on Appraisal

1. A system generated email is sent to notify you of your new task.
2. Schedule a Review Meeting with your Direct Report.
3. Once the meeting has been held, log in to the system and click on the task in your **To Do** list to access your employee's appraisal.
4. Select the date the **Review Meeting** was held and check the boxes under "Attended" to show that both you and the employee were present at the meeting.
5. If you would like to have printed copies of the appraisal on file, you can print them now using the "View Appraisal" links and check the boxes under "Signed Printed Appraisal" to show that they were printed and signed. This is not required.
6. Utilize the **Journal** field if you'd like to keep some private notes for yourself about this Appraisal. Anything entered in the **Journal** field cannot be seen by your direct report.
7. The "Acknowledge Complete" check box is preselected, click "Save." This is your final sign off on the Appraisal.

Acknowledge Complete

I, Shannon Manager3, acknowledge that:

The review meeting for Shannon Manager3 was held on the meeting date.

The information provided above is not correct. (Please enter corrections in Journal field).

Step 4: Executive Employee —Acknowledge Review Meeting & Sign off on Appraisal

1. A system generated email is sent to notify you of your new task.
2. Log in to the system and click on the task in your **To Do** list.
3. Utilize the **Journal** field if you'd like to keep some private notes for yourself about this Appraisal. Anything entered in the **Journal** field cannot be seen by your supervisor.
4. The box is preselected to show that you acknowledge the review meeting was held and that you give your final sign off on the Appraisal. Click "Save."
5. If you do not agree with the Appraisal, enter any comments in the Journal field and select the appropriate box at the bottom of the screen. Click "Save."

Appraisal Report

Author

Meeting Report

Meeting Leader

Step 5: Viewing Submitted Appraisals

To view Appraisals after they have been submitted, use the **Appraisal** link under **Reports** in the left-hand tool bar.

- Appraisal Report**—List of the Appraisals you have access to view, organized by who wrote the appraisal. In order to view both the self-appraisal and supervisor appraisal on the same report, click "View" next to the one authored by the supervisor.
- Meeting Report**—List of the Review Meetings you have access to view, organized by who led the meeting. Click "View" next to the meeting that you would like see the details of.