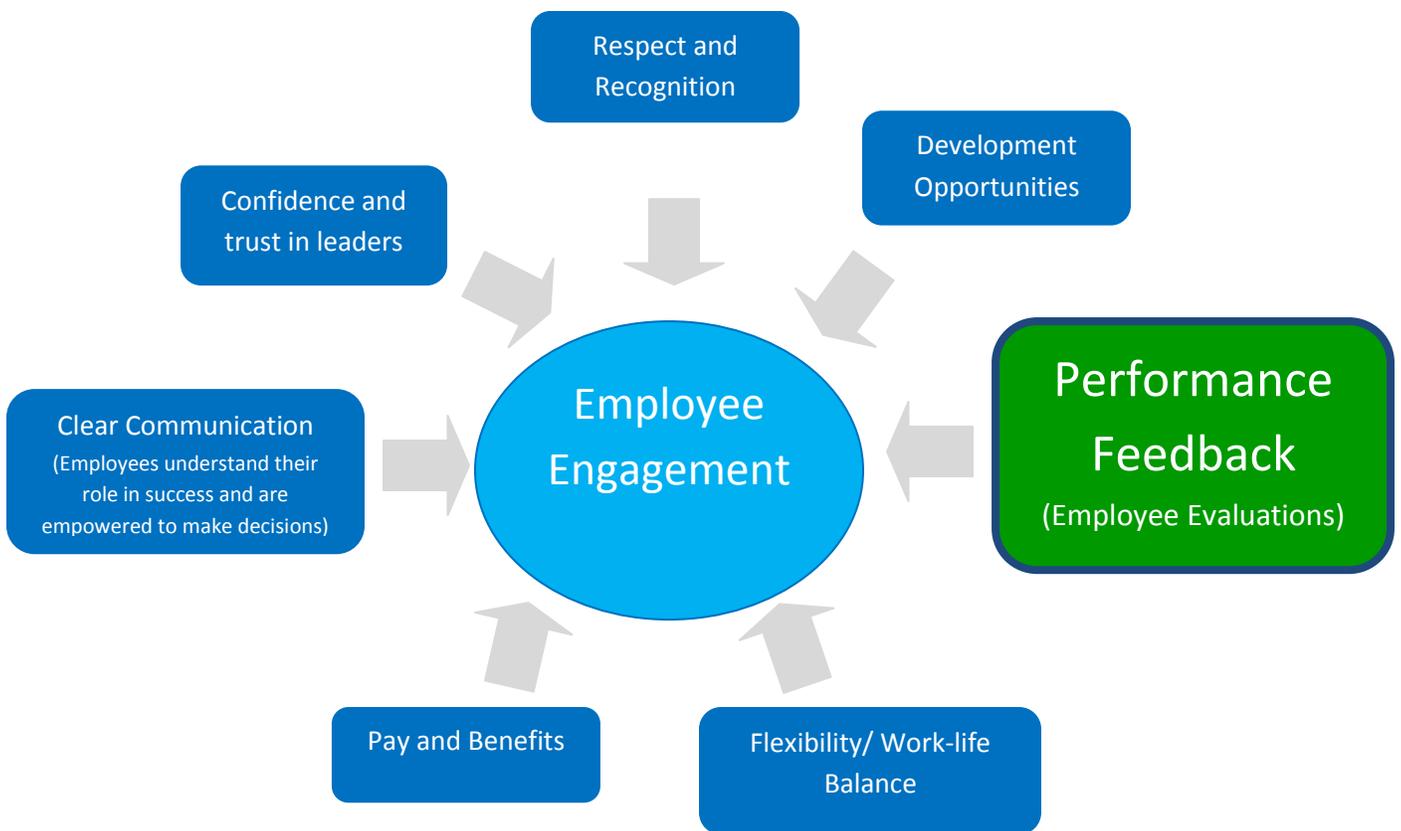


Bullseye Performance Management Evaluation Guide



*Diversity * Inclusion * Innovation * Learning*



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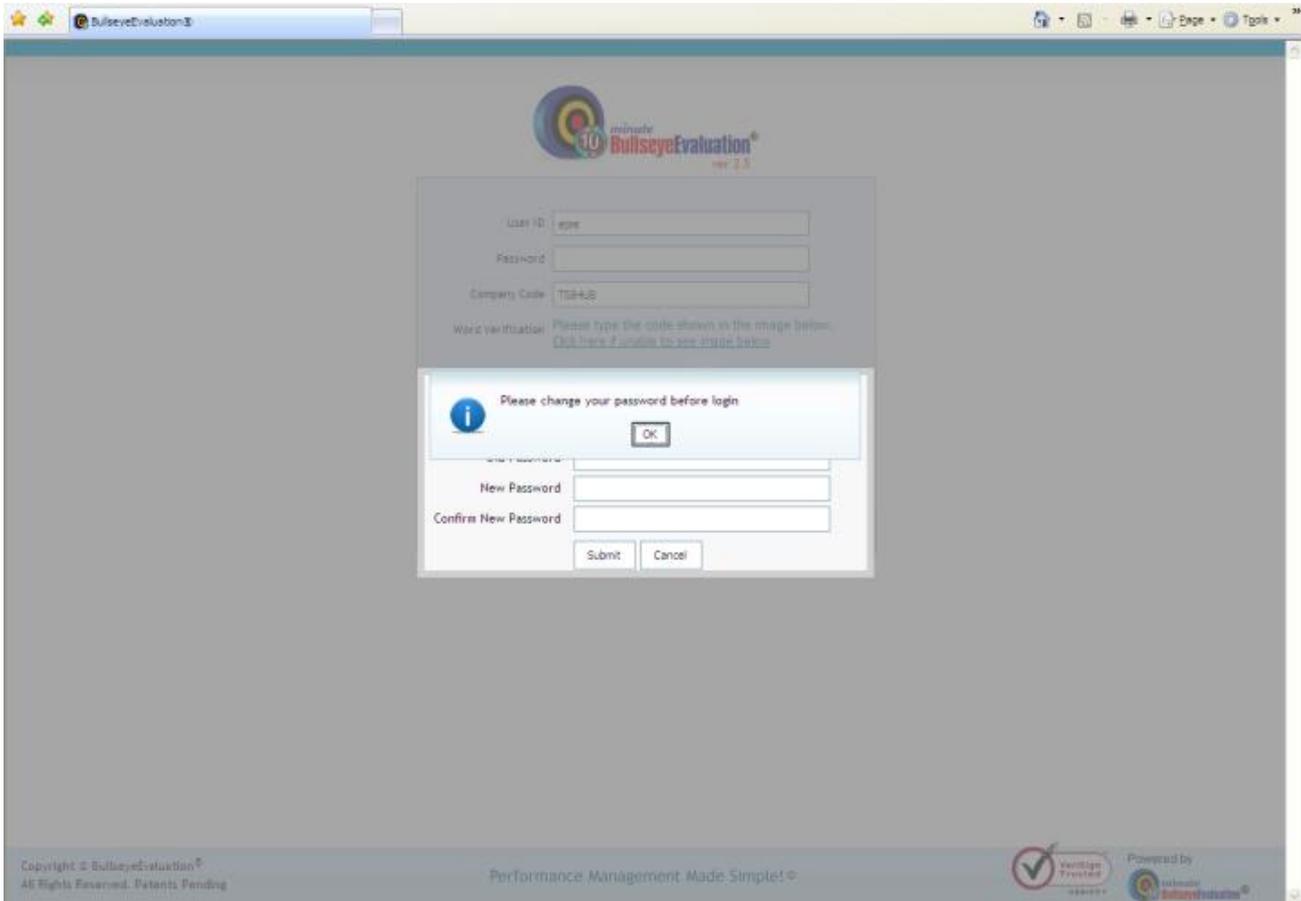
EFFECTIVE GOAL SETTING 27

How to Log In

Use the log in information that has been sent to you.

The company code is: TS84UB

Once you log in for the first time, you will be asked to create a new password.



The screenshot shows a web browser window titled "BullseyeEvaluation" with a login form. The form includes fields for "User ID" (containing "eye"), "Password", and "Company Code" (containing "TS84UB"). Below these is a "Word verification" section with a message: "Please type the code shown in the image below. [Click here if unable to see image below](#)".

A modal dialog box is displayed in the foreground with the title "Please change your password before login". It contains an "OK" button and three input fields: "New Password", "Confirm New Password", and a partially visible "Old Password" field. "Submit" and "Cancel" buttons are at the bottom of the dialog.

At the bottom of the browser window, there is a footer with the following text: "Copyright © BullseyeEvaluation® All Rights Reserved. Patents Pending", "Performance Management. Made Simple!™", a "Verified Trusted" logo, and "Powered by BullseyeEvaluation®".

How to Assign a Self-Evaluation to Your Employee

The first step of the evaluation process is for you to assign a self-evaluation to all of your staff employees who are eligible for an evaluation (those who have worked at TSU for at least 6 months since the start of the academic year (between September 1 – August 31).

All of your employees will be listed here (if an employee is missing email holbertme@tsu.edu)

Employees will only be listed once the evaluation period has started (Aug 1)

Click on "Assign Evaluation"

The screenshot shows the HRIS interface for Jessica Edwards, HRIS Analyst. The main navigation bar includes Administration, Organization Chart, Evaluations, Finance, Goals, Training, PDP, SP, Reports, and Help. The user's profile shows Emp ID: 00000 and Human Resources. The main content area displays 'Pending Evaluations (1)' and 'Evaluation Status (0)'. A list of employees is shown, with 'Ortiz, Bernardo (Payroll Specialist)' selected. The 'Assign Evaluation' button is highlighted with a yellow circle. Below the list, there are filters for 'From' (January 2013) and 'To' (December 2013), and a 'Reporting Employee' dropdown set to 'N/A'. A 'View Evaluation' button is visible for the 2012 evaluation. A yellow box at the bottom contains the text: 'If you have several employees, you might have a link on this screen to "view all employees"'. An arrow points from this box to the 'Assign Evaluation' button.

If you have several employees, you might have a link on this screen to "view all employees".

TSU TEXAS SOUTHERN UNIVERSITY

Welcome: Edwards, Jessica | Home | Log Out | Change Password | English

Business & Financial Services (Br0007)

Administration Organization Chart Evaluations At a Glance Goals Training PDP SP Reports Help

Assign Evaluation Save Cancel

Home > Assign Evaluation

ID 9999 Ortiz, Bernardo (Payroll Specialist) Human Resources 2013 (Annual)

Select Evaluation Options

- Standard Evaluation
- Self Review
- Peer Review
- 360* Review
- Team Review

Auto Assignment OFF

Self Review (1)

ID: 9999 Ortiz, Bernardo (Payroll Specialist)

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TSU TEXAS SOUTHERN UNIVERSITY

Welcome: Edwards, Jessica | Home | Log Out | Change Password | English

Business & Financial Services (Br0007)

Administration Organization Chart Evaluations At a Glance Goals Training PDP SP Reports Help

Assign Evaluation Update Cancel

Home > Assign Evaluation

ID 9999 Ortiz, Bernardo Human Resources 2013 (Annual)

Evaluation has been assigned successfully OK

Select Evaluation Options

- Self Review
- Peer Review
- 360* Review
- Team Review

Auto Assignment OFF

Self Review (1)

Ortiz, Bernardo (Payroll Specialist)

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The screenshot shows a HRIS dashboard for 'Business & Financial Services (Br0007)'. The user is logged in as 'Edwards, Jessica (HRIS Analyst)'. The dashboard displays 'Evaluation Status' for employee 'Ortiz, Bernardo (Payroll Specialist)'. The status is 'SELF REVIEW PENDING' and 'STANDARD EVALUATION PENDING'. A callout bubble points to the 'Evaluation Status' link, stating: 'Click on Evaluation Status to check the status of your employee's evaluation.' Another callout bubble points to the 'SELF REVIEW PENDING' box, stating: 'Once a self-evaluation has been completed by your employee, this box will turn green and say "self-review complete".' A third callout bubble points to the 'View All' link under 'My Evaluations', stating: 'If you have several employees, you might have a link on this screen to "view all evaluations".'

Congratulations – You have assigned a self-evaluation to your employee!

How to Complete Your Self Evaluation

Step 1: Log In

User ID: bortiz
Password: ●●●●
Company Code: ts84ub
Word Verification: Please type the code shown in the image below. [Click here if unable to see image below](#)
2dpw
Word verification is not case sensitive
2dpw
 Remember my username and company code
Login Forgot Password

By now, your log in information should have been emailed to you. If you don't have it, simply enter in your username (first initial and last name) and select "forgot password".

If you are still having issues email HolbertME@tsu.edu or SinclairSA@tsu.edu for assistance.

Welcome: Ortiz, Bernardo | Home | Log Out | Change Password | English

TSU TEXAS SOUTHERN UNIVERSITY Business & Financial Services (Br0007)

Evaluations Goals Training PDP SP Help

My Dashboard My Profile Messages(1) My Job Description

Drafts (0)

New Feature: Messages

The new "Messages" feature stores all messages sent or received within the Bullseye system. All of these messages are available inside the "Message Center" on the individual's dashboard.

Self Review (1) 360° Review (0) Don't show again Close X

ID : 9999 Ortiz, Bernardo (Payroll Specialist) 2013 Add to Outlook View Request

Emp ID: 9999 Ortiz, Bernardo (Payroll Specialist) Human Resources

My Evaluations (2) View All

2011 Approved

If you have a pop up window on your screen simple read the message then select "Don't show again".

Step 2: Select "View Request"

Welcome: Ortiz, Bernardo | Home | Log Out | Change Password | English

Business & Financial Services (Br0007)

Evaluations | Goals | Training | PDP | SP | Help

My Dashboard | My Profile | Messages (1) | My Job Description

Drafts (0)

No record found

Self Review (1) | 360° Review (0) | Peer Review (0) | Team Review (0)

Emp ID: 9999

Ortiz, Bernardo (Payroll Specialist)

2013 Add to Outlook

View Request

Ortiz, Bernardo (Payroll Specialist) Human Resources

My Evaluations

2011 Approved

If the tab says "Self Review (0)" that means that your manager has not yet assigned a self-evaluation to you. You will not be able to complete your self-review **UNTIL** your manager assigns it to you.

Select "View Request".

Welcome: Ortiz, Bernardo | Home | Log Out | Change Password | English

Business & Financial Services (Br0007)

Evaluations | Goals | Training | PDP | SP | Help

Self Review | Cancel

Employee ID: 9999

Ortiz, Bernardo (Payroll Specialist)

(Human Resources - Year 2013)

0% completed

Administrative Staff

Job Knowledge: Understands and has a working knowledge of all skills of assigned Not Observed

Productivity & Quality of Work: Works at expected pace; Work is thorough, neat & accurate Not Observed

Dependability & Decision Making: Follows instructions; reliable and responsive to assigned tasks; Not Observed

Flexibility: Easily learns and masters new skills; adaptable and willing to Not Observed

Job Habits and Time Management: Work area is clean and organized; enthusiastic, motivated worker. Not Observed

Teamwork: Practices respectful, honest and direct communication with all Not Observed

Attendance: Practices timeliness in reporting to work; works throughout scheduled Not Observed

Ownership: Demonstrates ownership and accountability for individual performance; Not Observed

Comments

AVERAGE 0.00

TOTAL 0/40

LEGEND

5= Exceptional

4= Good

3= Satisfactory

2= Marginal

1= Unsatisfactory

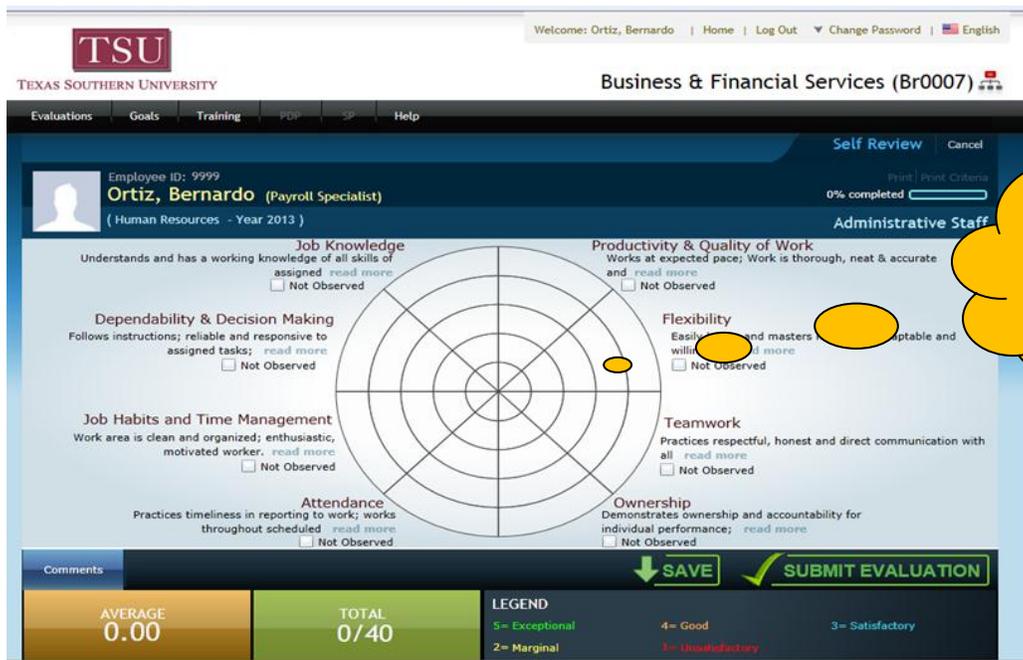
SAVE SUBMIT EVALUATION

Step 3: Complete the Evaluation

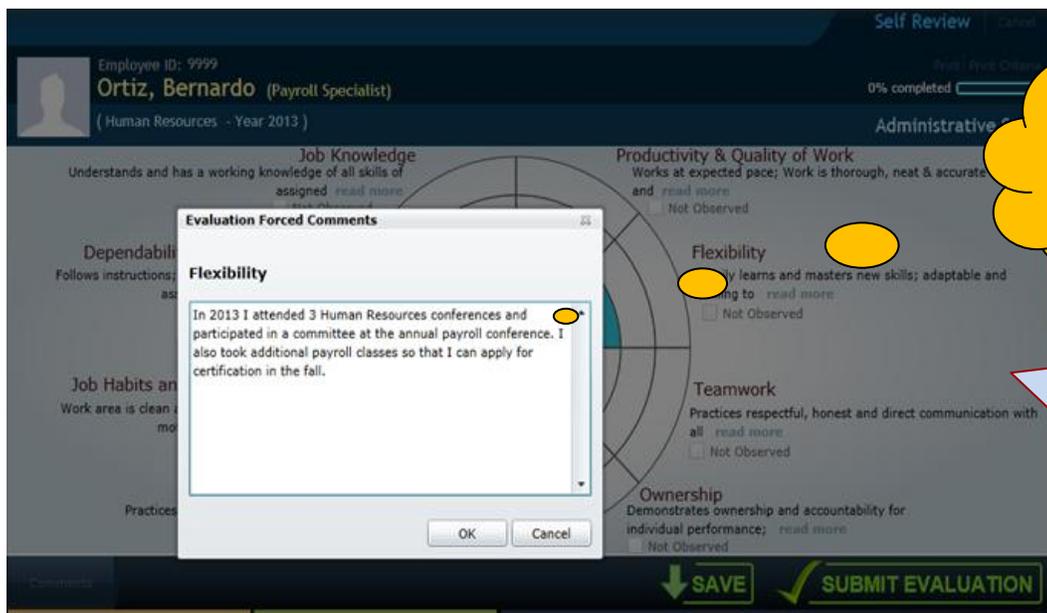
Your self-evaluation gives you an opportunity to give clear and honest feedback about your performance. Please take your time as you are writing your comments and be sure to **include examples** of accomplishments that you have achieved this year.

Be sure to point out improvements that you have made over this past year. How have you raised the bar? How have you improved your processes? How have you been innovative? Be sure to highlight this in your evaluation.

Also – **be honest**. If you didn't meet all of your goals or if you can recognize areas in your performance that you know you can improve on make a note of it. In order to grow you must first be willing to share your shortcomings.



Hover your mouse over each area of the BullsEye to see the descriptions of ratings between 1 – unsatisfactory and 5 – exceptional.



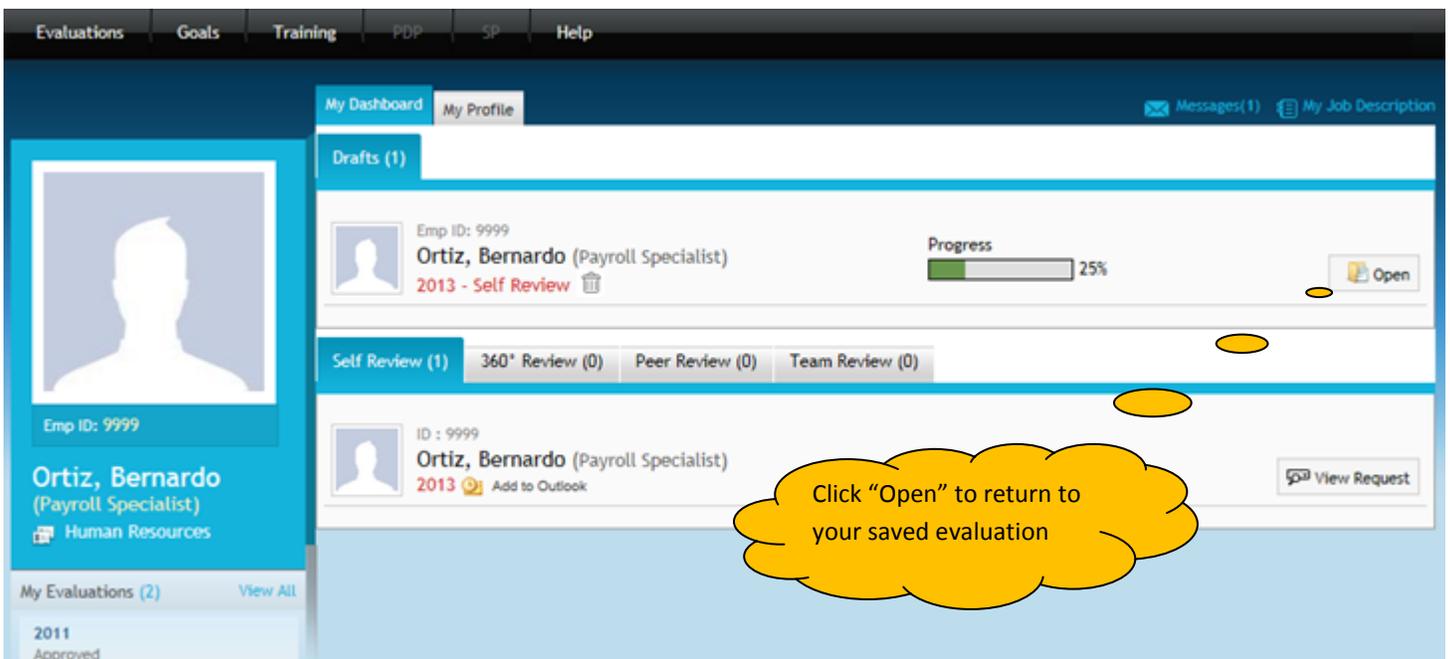
Complete notes for each section of the evaluations. Your notes should be specific, honest, and include examples.

If you are a manager, you'll notice a small blue arrow to the right of the Bullseye. This arrow will lead you to a second Bullseye that you will need to complete.

If you are unable to complete your self-evaluation in one sitting, simply save it as you would a regular file. Just click **“SAVE”** at the bottom of the screen.



When you are ready to complete the self-evaluation, log back in to Bullseye and click **“Open”**



Step 4: Submit the Evaluation.

Employee ID: 9999
Ortiz, Bernardo (Payroll Specialist)
(Human Resources - Year 2013)

100% completed

Evaluation has been submitted successfully

Job Knowledge
Understands and has a working knowledge of all skills of
assigned tasks; [read more](#)
 Not Observed

Productivity & Quality of Work
Works at expected pace; Work is thorough, neat and ac
Observed

Flexibility
Easily learns and masters new skills; adaptable an
willing to [read more](#)
 Not Observed

Teamwork
Practices respectful, honest and direct communication with
all [read more](#)
 Not Observed

Ownership
Demonstrates ownership and accountability for
individual performance; [read more](#)
 Not Observed

Attendance
Practices timeliness in reporting to work; works
throughout scheduled [read more](#)
 Not Observed

Job Habits and Time Management
Work area is clean and organized; enthusiastic,
motivated worker. [read more](#)
 Not Observed

Comments | **View Forced Comments**

AVERAGE 3.62 | **TOTAL** 99.10 | **LEGEND**
5 - Exceptional | 4 - Good | 3 - Satisfactory

SAVE | **SUBMIT EVALUATION**

Once you have completed the evaluation, click "Submit Evaluation".

Congratulations – You have completed and submitted your self-evaluation!

Click "Home" to return to the home screen

TSU
TEXAS SOUTHERN UNIVERSITY

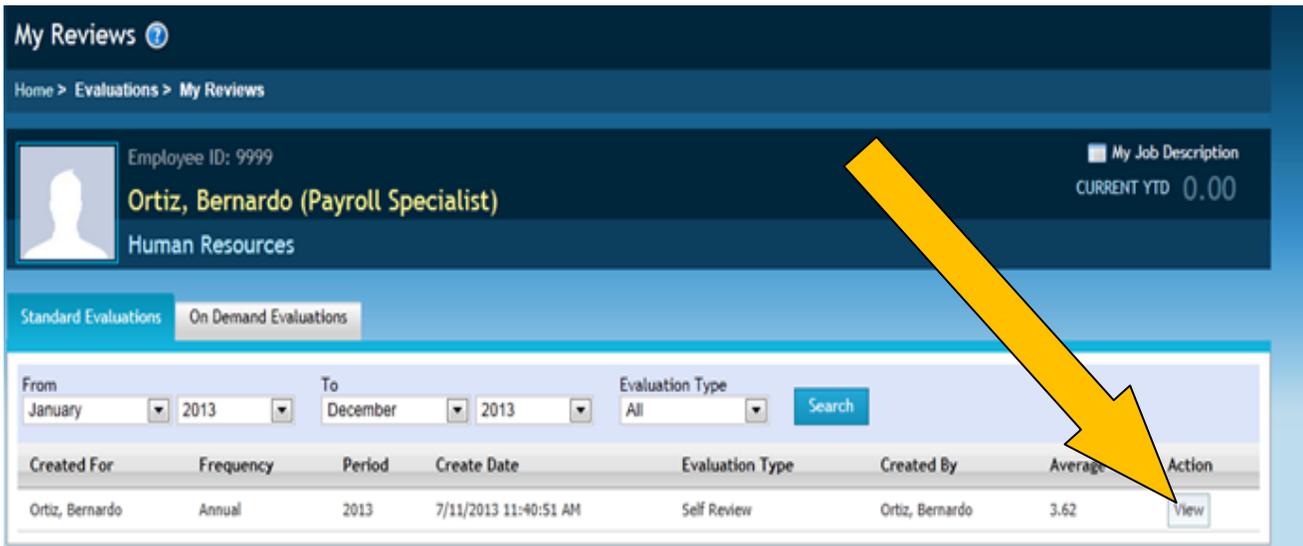
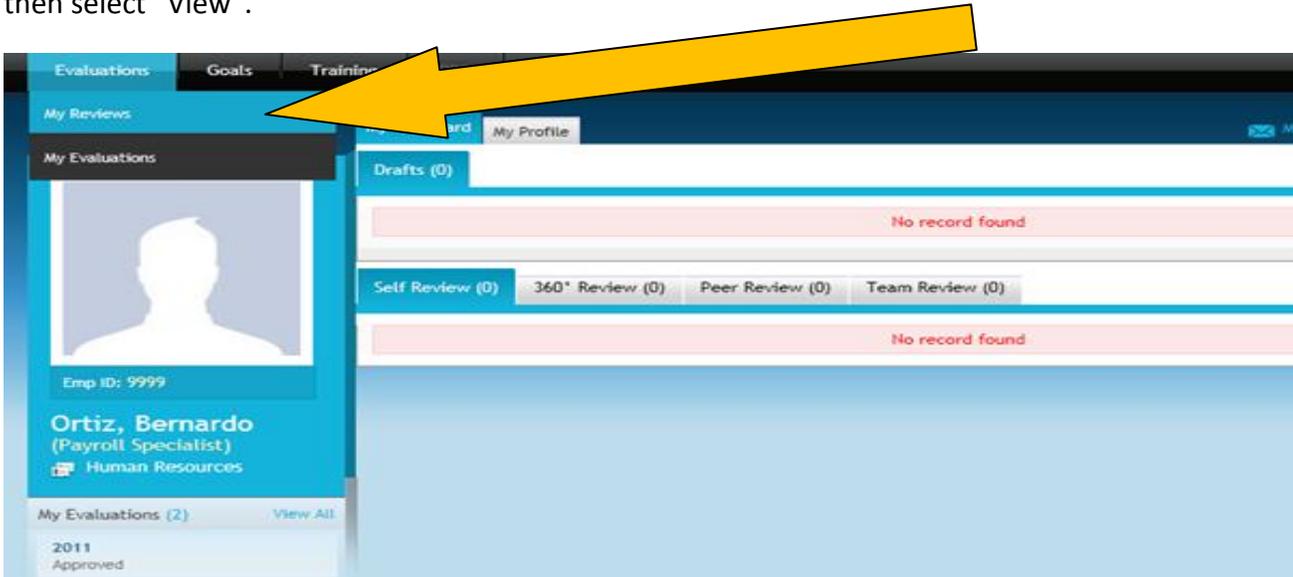
Welcome: Ortiz, Bernardo | Home | Log Out | Change Password | English

Business & Financial Services (Br007)

Evaluations | Goals | Training | PDP | SP | Help

How to View Your Self Evaluation After You Have Completed and Submitted it

On the home page Click on “Evaluations”, then “My Reviews”. Enter in the correct date range, click “Search” then select “View”.



How to View, Save, and Print Your Employee's Self Evaluation

Before you get started on writing a standard evaluation for your employee, you'll need to review their self-evaluation. Employee self-evaluations give managers a unique opportunity to see how employees view their own performance. In departments with clear communication, and with employees who are honest about their performance, a self-evaluation will give the manager confirmation that their employee is knowledgeable of the department goals and initiatives.

Remember – employees do **not** write their own evaluations.

An employee self-evaluation is just another tool that managers will use when they write the actual evaluation. The standard evaluation (which is written by the department manager) is the evaluation of record. Standard evaluations should be based on manager observations and notes during the year, along with considering the information provided in the employees' self-evaluation.

Once your employee has completed their self-evaluation you'll be able to log in to Bullseye and view a copy.

Step 1 – Click on the “Evaluation Status” tab

Step 2 – Click on “Self Review Complete”

The screenshot displays the Bullseye HR system interface. At the top, there is a navigation bar with the TSU logo and the text "TEXAS SOUTHERN UNIVERSITY". The user is logged in as "Edwards, Jessica" (HRIS Analyst) in the Human Resources department. The main dashboard shows the "Evaluation Status" tab selected, with a yellow arrow labeled "Step 1" pointing to it. Below the tabs, there is a section for "Ortiz, Bernardo (Payroll Specialist) 2013" with a yellow arrow labeled "Step 2" pointing to the "SELF REVIEW COMPLETE" button. The interface also shows a "No record found" message and a "Top Performers" chart.

Step 3 – Click “Print” then follow the prompts

Administration Organization Chart Evaluations At a Glance Goals Training PDP SP Reports Help

Self Review Cancel

Employee ID: 9999
Ortiz, Bernardo (Payroll Specialist)
 (Human Resources - Year 2013)

Print Print Criteria

Administrative Staff

Job Knowledge
 Understands and has a working knowledge of all skills of assigned tasks; [read more](#)
 Not Observed

Productivity & Quality of Work
 Works at expected pace; Work is thorough, neat and accurate; [read more](#)
 Not Observed

Dependability & Decision Making
 Follows instructions; reliable and responsive to assigned tasks; [read more](#)
 Not Observed

Flexibility
 Easily learns and masters new skills; adaptable and willing to [read more](#)
 Not Observed

Job Habits and Time Management
 Work area is clean and organized; enthusiastic, motivated worker. [read more](#)
 Not Observed

Teamwork
 Practices respectful, honest and direct communication with all [read more](#)
 Not Observed

Attendance
 Practices timeliness in reporting to work; works throughout scheduled [read more](#)
 Not Observed

Ownership
 Demonstrates ownership and accountability for individual performance; [read more](#)
 Not Observed

Comments View Forced Comments

AVERAGE 3.67 TOTAL 29/40

LEGEND
 5= Exceptional 4= Good 3= Satisfactory

https://my.bulleyevaluation.com/TSU

Print Evaluation - Windows Internet Explorer

https://my.bulleyevaluation.com/PrintSelfEvaluation.aspx?empID=g8AMQ2qH47Q28&scoreID=1182&demandId=646

TSU TEXAS SOUTHERN UNIVERSITY

Self Evaluation Summary

OF THE

Ortiz, Bernardo
 9999
 (Payroll Specialist)

Financial Services (Br0007)

Self Review Cancel

Print Print Criteria

Administrative Staff

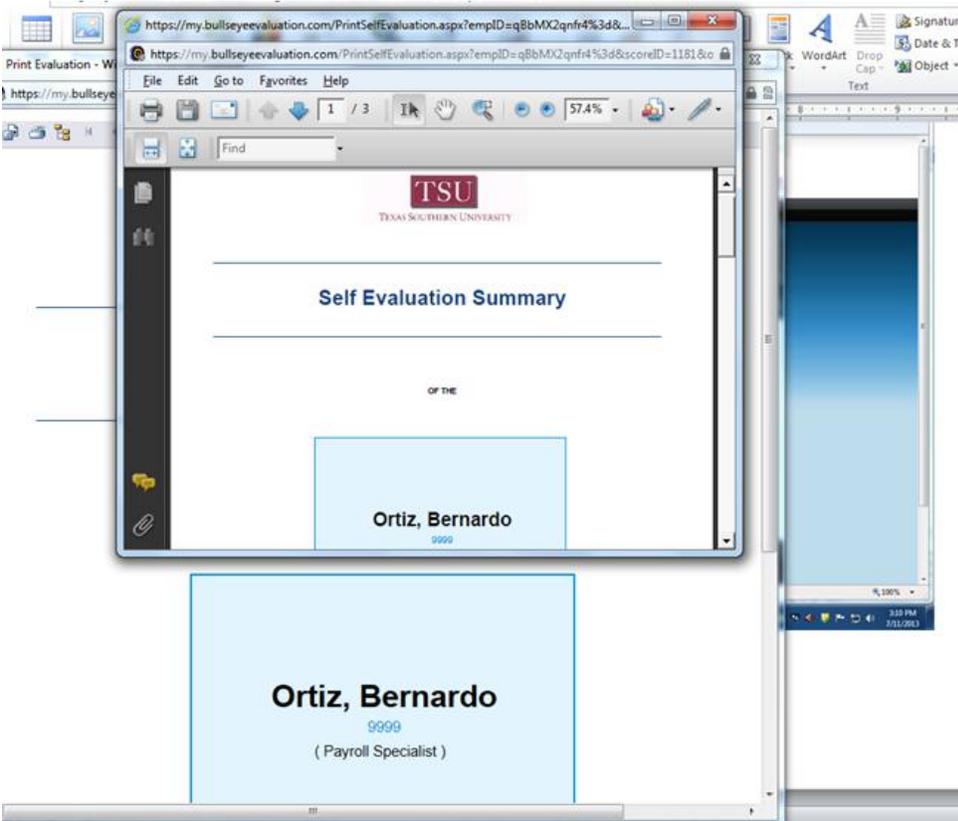
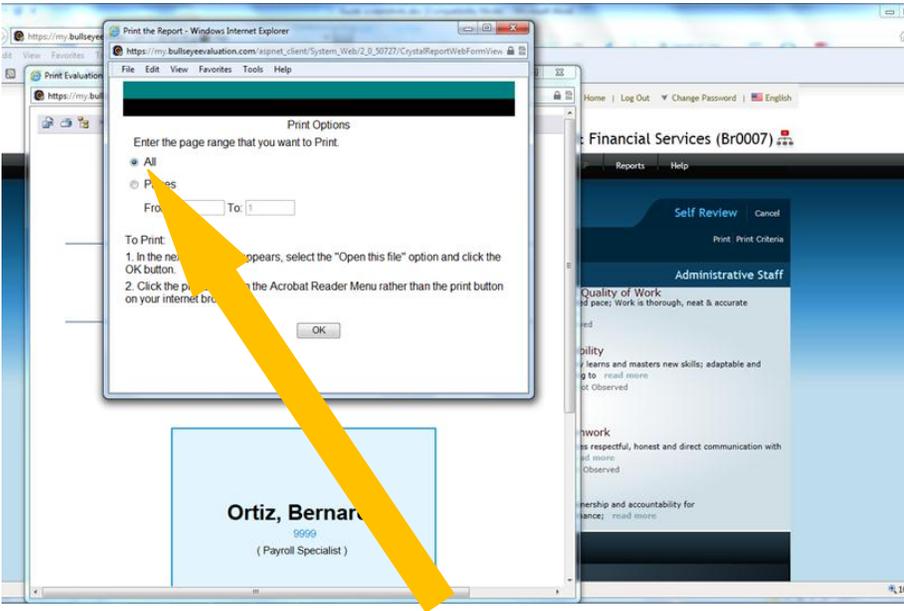
Quality of Work
 Works at expected pace; Work is thorough, neat & accurate
[read more](#)
 Not Observed

Flexibility
 Easily learns and masters new skills; adaptable and willing to [read more](#)
 Not Observed

Teamwork
 Practices respectful, honest and direct communication with all [read more](#)
 Not Observed

Ownership
 Demonstrates ownership and accountability for individual performance; [read more](#)
 Not Observed

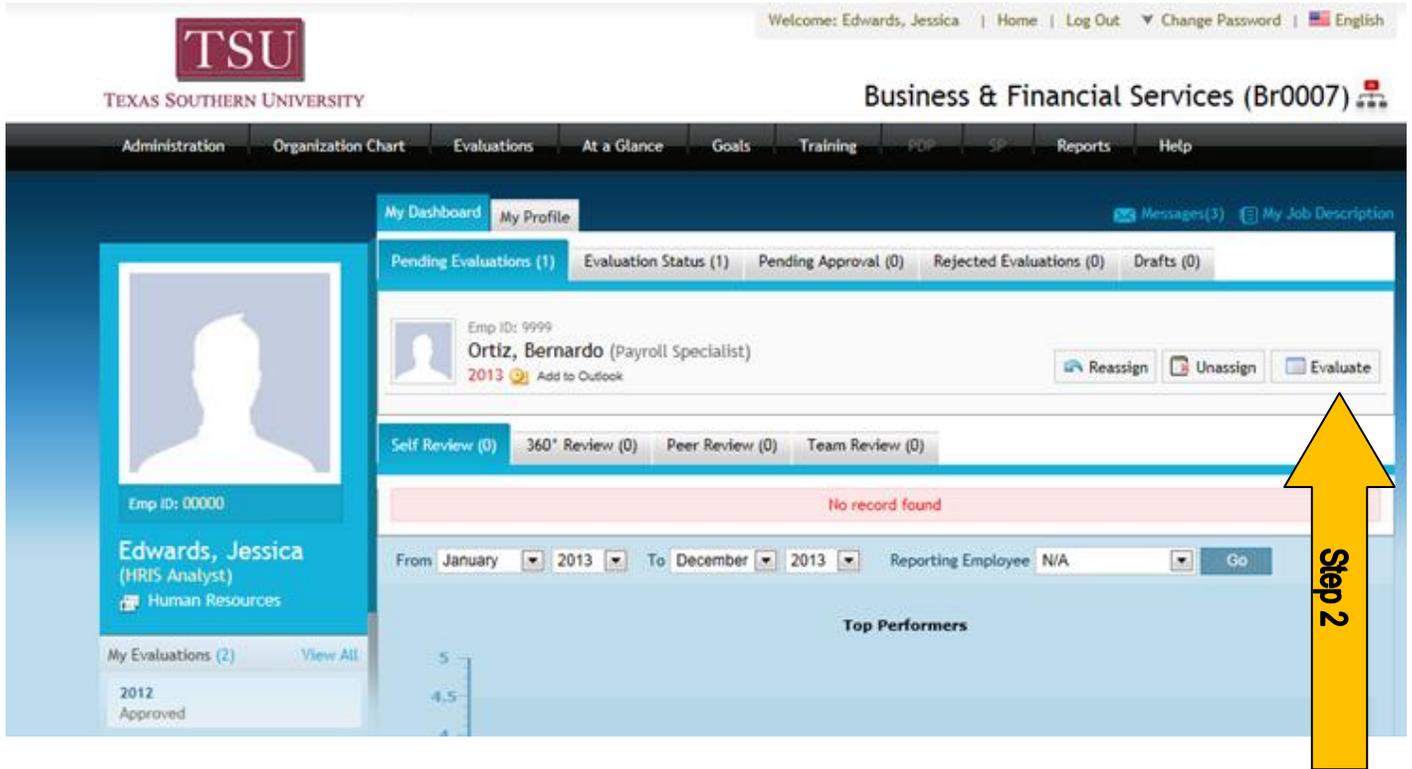
- Click on the printer icon
- Click “All”
- The document will then be converted in to an Adobe PDF file for you to print and/or save.



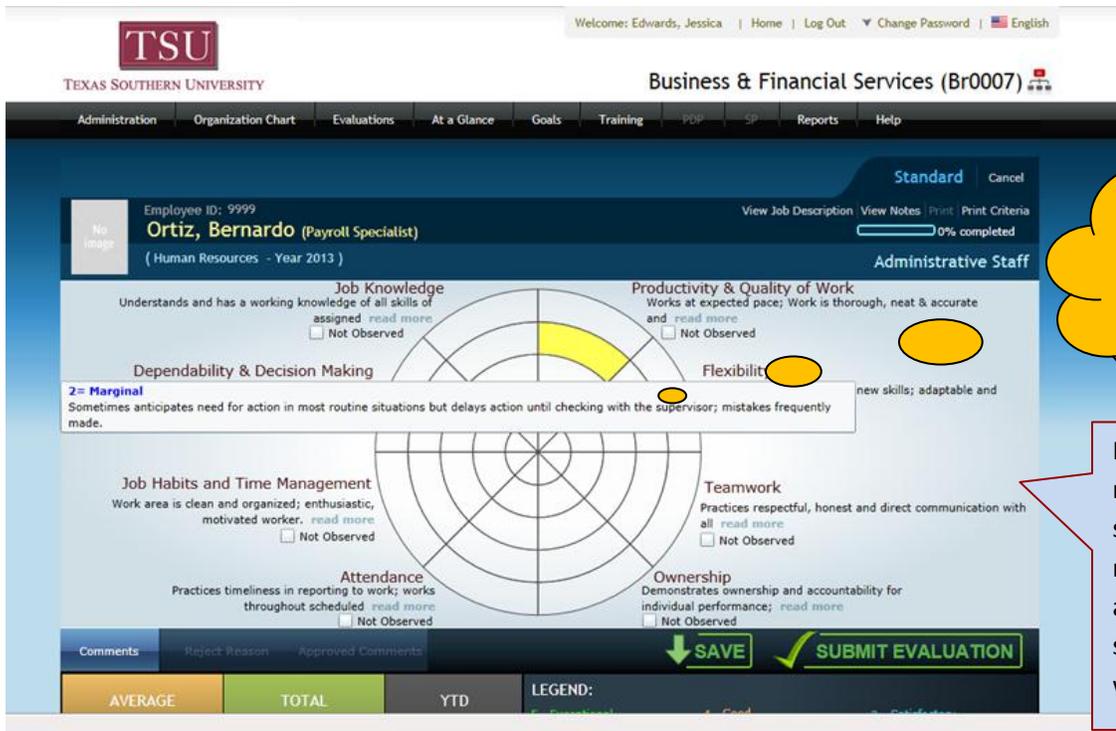
How to Complete a Standard Evaluation

Step 1 – Log In

Step 2 – Click on “Evaluate”



Step 3 – Complete the evaluation



Hover your mouse over each area of the Bullseye to see the descriptions of ratings between 1 – unsatisfactory and 5 – exceptional.

If you are evaluating a manager, you'll notice a small blue arrow to the right of the Bullseye. This arrow will lead you to a second Bullseye that you will need to complete.

The screenshot shows the TSU Business & Financial Services (Br0007) evaluation interface. The employee being evaluated is Bernardo Ortiz (Payroll Specialist). The progress bar indicates 0% completion. A dialog box titled 'Evaluation Forced Comments' is open, with the 'Flexibility' section selected. The dialog box contains a large text area for entering comments and 'OK' and 'Cancel' buttons. The background shows various evaluation criteria like 'Job Knowledge', 'Productivity & Quality of Work', 'Dependability & Decision Making', 'Job Habits and Time Management', and 'Attendance'. At the bottom, there are 'SAVE' and 'SUBMIT EVALUATION' buttons.

Complete notes for each section of the evaluations. Your notes should be specific, honest, and include examples.

The screenshot shows the same evaluation interface, but now with a success message: 'Evaluation has been saved successfully'. The progress bar shows 75% completion. A radar chart is visible in the center, with colored segments representing different criteria. The 'Flexibility' and 'Teamwork' sections are highlighted. The 'SAVE' button is now green and active, and the 'SUBMIT EVALUATION' button is also visible. The background shows the same evaluation criteria as the previous screenshot.

Click on "SAVE" and then "OK" if you'd like to save your evaluation and complete it at a later time.

When you are ready to complete the evaluation, log back in to Bullseye, click on “Drafts” then click “Open”

The screenshot shows the Bullseye HR system interface. At the top, there is a navigation bar with 'Administration', 'Organization Chart', 'Evaluations', 'At a Glance', 'Goals', 'Training', 'Reports', and 'Help'. The main content area displays a user profile for 'Edwards, Jessica (HRIS Analyst)' and a list of evaluations. The 'Drafts' tab is selected, showing one draft evaluation for 'Ortiz, Bernardo (Payroll Specialist)'. A progress bar indicates 75% completion. A yellow callout bubble points to the 'Drafts' tab with the text 'Click "Drafts"'. Another yellow callout bubble points to the 'Open' button next to the evaluation with the text 'Click "Open"'. The interface also includes a search bar, a 'Go' button, and a 'Top Performers' section.

Step 4 – Submit the evaluation

Once you have completed the evaluation, click “SUBMIT EVALUATION”

The screenshot shows the evaluation submission screen. It features a radar chart with five categories: 'Job Habits and Time Management', 'Attendance', 'Teamwork', 'Ownership', and 'Flexibility'. Each category has a description and a 'Not Observed' checkbox. The 'SUBMIT EVALUATION' button is highlighted in green. Below the radar chart, there are 'SAVE' and 'SUBMIT EVALUATION' buttons. The interface also includes a 'Comments' section and a 'Reject Reason' dropdown.

Your evaluation will then be sent to your approver for a final review.

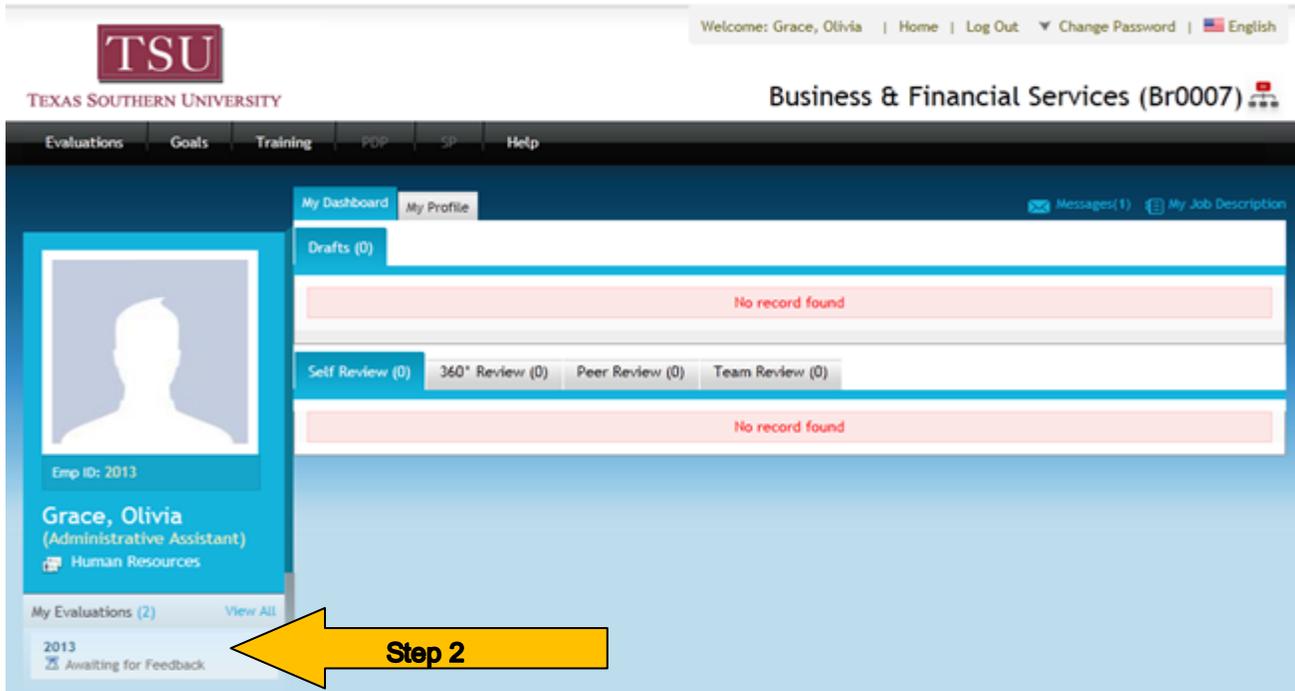
The screenshot shows the evaluation submission screen with a confirmation message: 'Evaluation has been sent for approval'. The message is displayed in a white box with an 'OK' button. The background shows the same radar chart and evaluation details as the previous screenshot. The 'SUBMIT EVALUATION' button is now disabled, and the 'SAVE' button is highlighted in green. The interface also includes a 'Comments' section and a 'Reject Reason' dropdown.

Congratulations – You have completed and submitted your employee’s evaluation!

How to review your evaluation and give feedback

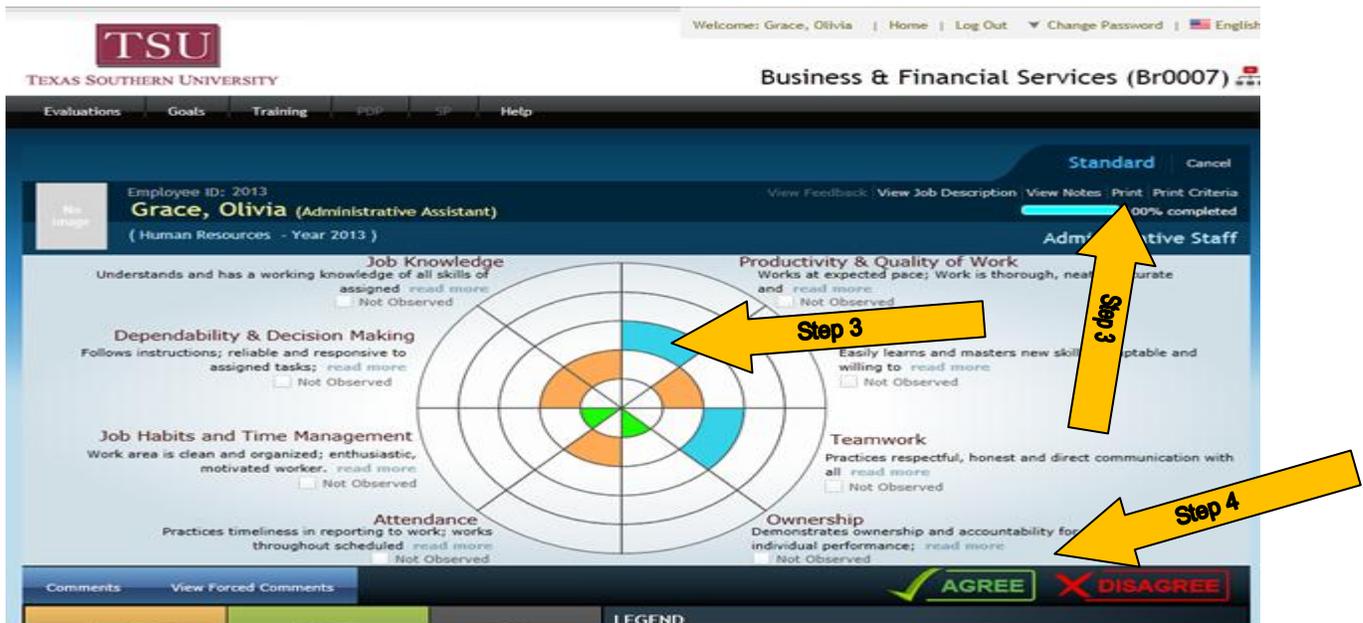
Step 1 – log in

Step 2 – Click on “Awaiting Feedback”



Step 3 – Review the evaluation. You can do this by clicking on each area of the evaluation to see your manager’s notes, or you can click on “print” to download the evaluation and review your manager’s notes.

Step 4 - Select either “Agree” or “Disagree” and add in your comments.



Review an evaluation you have already written

Step 1: Click on "Evaluations" then click "Search evaluations"

Welcome: Edwards, Jessica | Home | Log Out | Change Password | English

TEXAS SOUTHERN UNIVERSITY Business & Financial Services (Br0007)

Administration Organization Chart **Evaluations** At a Glance Goals Training PDF SP Reports Help

My Reviews
My Evaluations
Pending Evaluations
Evaluation Status
Self Review
Search Evaluations
Pending Approval

Messages(3) My Job Description

Approved (0) Pending Approval (0) Rejected Evaluations (0) Drafts (0)

No record found

Self Review (0) Team Review (0)

No record found

From January 2013 To December 2013 Reporting Employee N/A Go

Edwards, Jessica (HRIS Analyst) Human Resources

My Evaluations (2) View All

2012 Approved

Top Performers

No Data Series

Step 2: Click "View"

Welcome: Edwards, Jessica | Home | Log Out | Change Password | English

TEXAS SOUTHERN UNIVERSITY Business & Financial Services (Br0007)

Administration Organization Chart Evaluations At a Glance Goals Training PDF SP Reports Help

Search Evaluations

Home > Evaluations > Search Evaluations

Search

First Name Last Name From January 2010 To December 2013

Frequency All Evaluation Status All Department All Search

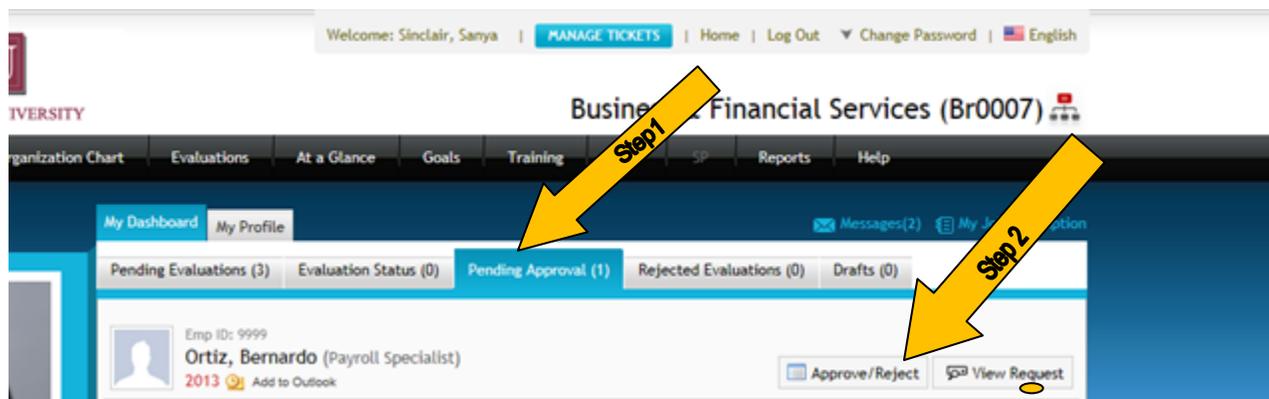
Emp ID	Name	Department	Frequency	Create Date	Period	Evaluation Status	Action
7777	Doe, Jane	Human Resources	Annual	10/7/2011	2010	Approved	View View Evaluation Review
7777	Doe, Jane	Human Resources	Annual	8/17/2012	2011	Approved	View View Evaluation Review
7777	Doe, Jane	Human Resources	Annual	9/11/2012	2012	Approved	View View Evaluation Review
2013	Grace, Olivia	Human Resources	Annual	8/1/2012	2012	Approved	View View Evaluation Review
999	Kent, Clark	Human Resources	Annual	4/30/2012	2011	Approved	View View Evaluation Review
9999	Ortiz, Bernardo	Human Resources	Annual	10/4/2011	2010	Approved	View View Evaluation Review
9999	Ortiz, Bernardo	Human Resources	Annual	10/4/2011	2011	Approved	View View Evaluation Review
9999	Ortiz, Bernardo	Human Resources	Annual	7/11/2013	2013	Approval Pending	View View Evaluation Review

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Approve or Reject an Evaluation

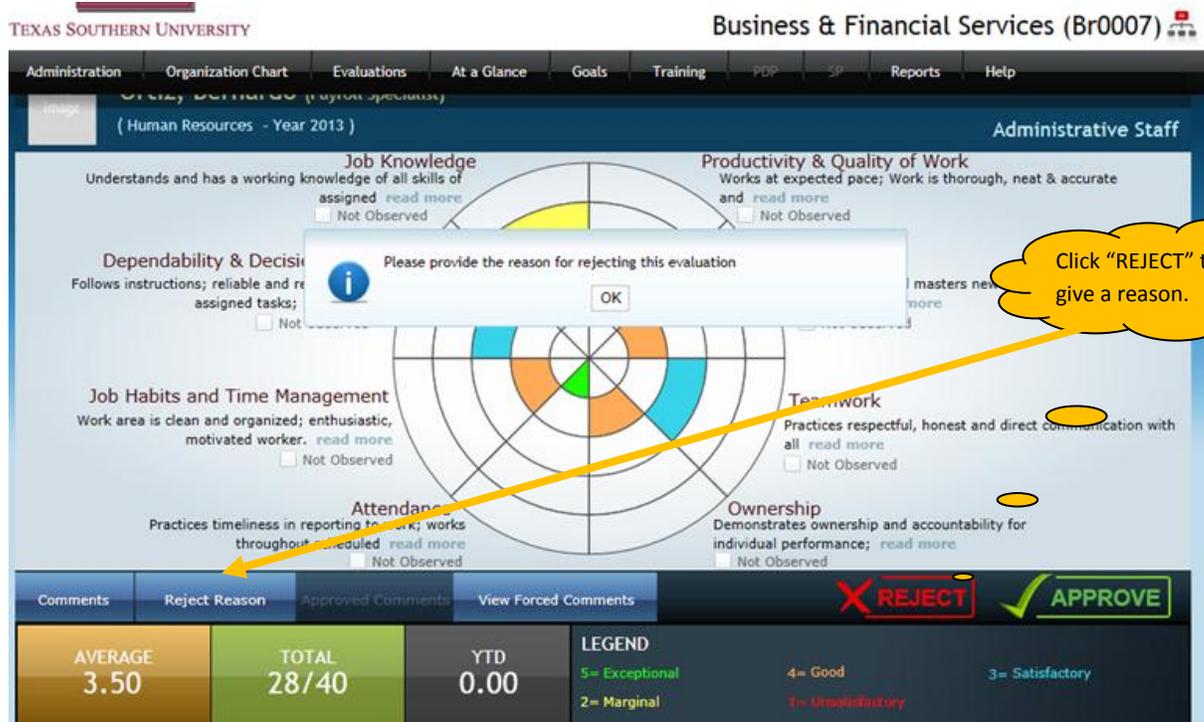
Step 1: Click on the "Pending Approval" tab



Step 2: Click "Approve/ Reject"

To view the employee's original self-evaluation click on "view Request".

To REJECT an evaluation



The Evaluation will then be sent back to the manager to review, edit, and resubmit for approval.

To APPROVE an evaluation

The screenshot displays the Texas Southern University (TSU) evaluation interface. At the top, the user is identified as Sinclair, Sanya, with options for 'MANAGE TICKETS', 'Home', 'Log Out', 'Change Password', and 'English'. The main header shows 'Business & Financial Services (Br0007)'. A navigation menu includes 'Administration', 'Organization Chart', 'Evaluations', 'At a Glance', 'Goals', 'Training', 'PDP', 'SP', 'Reports', and 'Help'. The current view is for 'Human Resources - Year 2013'. The evaluation criteria are visible, including 'Job Knowledge', 'Productivity & Quality of Work', 'Dependability & Decision Making', and 'Job Habits and Time Management'. A modal dialog box titled 'Approved Comments (Optional)' is open, featuring a text input area and 'OK' and 'Cancel' buttons. A yellow callout bubble with arrows pointing to the input area and the 'OK' button contains the text: 'Click "APPROVE". You will also have the option to leave a comment.' and 'Click "OK"'. At the bottom of the interface, there are 'REJECT' and 'APPROVE' buttons, along with a summary table and a legend.

AVERAGE	TOTAL	YTD
3.50	28/40	0.00

LEGEND
5= Exceptional
4= Good
3= Satisfactory
2= Marginal
1= Unsatisfactory

Congratulations – You have completed the approval process.

Where is my evaluation?

For Employees

To review all of your past evaluations:

Welcome: Ortiz, Bernardo | Home | Log Out | Change Password | English

Business & Financial Services (Br0007)

Evaluations | Goals | Training | PDP | SP | Help

My Reviews | My Dashboard | My Profile | Messages (1) | My Job Description

My Evaluations

Drafts (0)

No record found

Self Review (0) | 360° Review (0) | Peer Review (0) | Team Review (0)

No record found

Emp ID: 9999

Ortiz, Bernardo
(Payroll Specialist)
Human Resources

My Evaluations (3) | View All

2013
Approved

There are 2 ways to get to your evaluations

- 1) Directly under your picture, click beside My Evaluations
- 2) Click on the "Evaluations" tab at the top of your screen. Then click on "My Evaluations"

You will only be able to access evaluations that have been approved by your department head/ VP.

For Managers

Top view the evaluations you have written

Welcome: Edwards, Jessica | Home | Log Out | Change Password | English

Business & Financial Services (Br0007)

Administration | Organization Chart | Evaluations | At a Glance | Goals | Training | PDP | SP | Reports | Help

My Reviews | My Dashboard | My Profile | Messages (3) | My Job Description

My Evaluations

Pending Evaluations

Evaluation Status

Self Review

Search Evaluations

Pending Approval

From January 2013 To December 2013

Top Performers

No Data Series

Emp ID: 00000

Edwards, Jessica
(HRIS Analyst)
Human Resources

My Evaluations (2) | View All

2012
Approved

Click on the "Evaluations" tab at the top of your screen. Then click on "Search Evaluations"

Handling the appraisal meeting – Tips for Managers

The Evaluation Meeting

1. Schedule the meeting in advance. Make sure that you have a quiet, private room with no disruptions (a conference room is a good choice). Be sure to schedule enough time for a discussion (1 – 1.5hrs)
2. Welcome the employee; put the employee at ease.
3. Let the employee start
 - a. Listen and take notes.
 - b. Maintain good eye contact and attentive posture.
 - c. Reflect back to the employee your understanding of what the employee said.
 - d. Don't interrupt, but ask questions only for clarification.
 - e. Apply the 90/10 Rule: the employee talks 90% of the time and you talk 10% of the time.
 - f. Be non-judgmental
4. Compare the actual specific performance results and behaviors to the standards. Stay away from an attitude or personality focus.
5. Keep the appraisal open to employee input.
6. Ask the employee for ideas about how to resolve problems.
7. Focus on the future, not on the past.
8. Emphasize strengths, as well as areas that need improvement.
9. Be honest and be prepared to discuss questionable items. Support the employee's effort to improve.
10. Set goals, expectations, and standards together for the next appraisal*.
11. Discuss development/training plans with the employee.
12. Summarize the session and end on a positive note.

*Goals should be SMART: Specific; Measurable; Attainable; Relevant; Timely.

Handling employee behaviors

- **If the employee becomes defensive or makes excuses:**
 - Listen to what the employee has to say and paraphrase back. Remain neutral. Maintain eye-contact.
 - Ask for specifics with open-ended questions.
 - Try to determine the cause:
 - "Tell me more." "How did you reach that conclusion?"
 - Ask how the employee will resolve the problem.

- **If the employee becomes angry:**
 - Stay calm and centered. Maintain eye-contact.
 - Listen to what the employee has to say and paraphrase back.
 - Let the employee "run down" for as long as s/he needs until the employee can listen to you.
 - Avoid arguments.
 - Bring discussion and focus back to performance and standards.
 - Say the employee's name, and ask open-ended questions.

- **If the employee is unresponsive or withdraws:**
 - Be patient and friendly.
 - Show concern.
 - Stay silent, and wait for the employee to say something.
 - Ask open-ended questions.
 - Note that the employee is unresponsive.
 - Encourage the employee that you want to hear his or her input, and this input is important to you.

Handling the appraisal meeting – Tips for Employees

Tips for a successful meeting

1. Remember that the appraisal meeting is a discussion and a dialog between you and your supervisor.
2. Maintain good eye-contact, attentive posture, and a professional manner.
3. Listen and take notes.
4. Reflect back to your supervisor your understanding of what your supervisor said.
5. Compare the actual specific performance results and behaviors to the standards. Stay away from blaming others and making excuses.
6. Emphasize strengths, as well as areas that need improvement.
7. Be honest and take responsibility.
8. Provide your ideas on how to resolve problems.
9. If you don't agree with your supervisor, ask for specific examples.
10. Set goals*, expectations, and standards together for the next appraisal.
11. Discuss development and training needs.
12. Tell your supervisor what you need to do your job more efficiently

**Goals should be SMART: Specific; Measurable; Attainable; Relevant; Timely.*

Be willing to discuss:

- What are your major accomplishments?
- What could you have done better?
- Do you understand what is expected of you? Are performance standards and work rules clear?
- What training or professional development do you need?
- Would you like to see your responsibilities change? How? Why?
- What career goals do you have? What do you need to attain those goals?
- How are relationships going with your co-workers? What could they do to help you perform your job better?
- What could your supervisor do to help you perform your job better?

Effective Goal Setting:

The difference between a dream and a goal: Dreams are visions of what you want to achieve or who you want to be. Goals are clear, specific and measurable and they have a deadline.

A goal is a written statement that clearly describes certain specific actions or tasks with a measurable end result and a clear deadline.

To make a goal real and tangible, it must be **written**. This will serve as a reminder to you and others of what you intend to accomplish. It also serves as a point of reference for you to monitor and evaluate as you progress. Making goals public also increases your commitment to the goal.

Goals must be **specific**. By clearly defining your goal, you eliminate any possible misunderstanding as to what needs to be accomplished.

In order to improve or to track your progress, your goal must be **measurable**. This ensures that it will be clear once that goal has been accomplished. If you can't measure a goal, chances are it will not be met, or you won't even know when you've met it.

Every goal must have a clear **deadline**. This will encourage a sense of urgency and give more clarity to what needs to be accomplished.

Why are goals important?

- Goals motivate you to work towards something
- Goals make you accountable
- Goals challenge you to be your best
- Goals increases your pride and confidence when they have been completed
- Goals help improve and correct deficiencies in performance

What are SMART goals?

- S:** Specific
- M:** Manageable
- A:** Attainable
- R:** Relevant
- T:** Timely

A **specific** goal will usually answer the five "W" questions:

- What: What do I want to accomplish?
- Why: Specific reasons, purpose or benefits of accomplishing the goal.
- Who: Who is involved?
- Where: Identify a location.
- Which: Identify requirements and constraints.

Measurable

If a goal is not measurable, it is not possible to know whether a team is making progress toward successful completion. Measuring progress is supposed to help a team stay on track, reach its target dates, and experience the exhilaration of achievement that spurs it on to continued effort required to reach the ultimate goal.

A measurable goal will usually answer questions such as:

- How much?
- How many?
- How will I know when it is accomplished?

Attainable

Goals must be realistic and attainable. While an attainable goal may stretch a team in order to achieve it, the goal is not extreme. That is, the goals are neither out of reach nor below standard performance, as these may be considered meaningless. When you identify goals that are most important to you, you begin to figure out ways you can make them come true. You develop the attitudes, abilities and skills to reach them. The theory states that an attainable goal may cause goal-setters to identify previously overlooked opportunities to bring themselves closer to the achievement of their goals.

An attainable goal will usually answer the question:

- How: How can the goal be accomplished?

Relevant

A relevant goal must represent an objective that the goal-setter is willing and able to work towards. This does not mean the goal cannot be high. A goal is probably relevant if the goal-setter believes that it can be accomplished. If the goal-setter has accomplished anything similar in the past they may have identified a relevant goal.

A relevant goal will usually answer the question:

- Does this seem worthwhile?

Time-bound

It is important to set a timeframe for your goals, giving them a target date. A commitment to a deadline helps a team focus their efforts on the completion of the goal on or before the due date. This part of the S.M.A.R.T. goal criteria is intended to prevent goals from being overtaken by the day-to-day crises that invariably arise in an organization. A time-bound goal is intended to establish a sense of urgency.

A time-bound goal will usually answer the question:

- When?
- What can I do 6 months from now?
- What can I do 6 weeks from now?
- What can I do today?