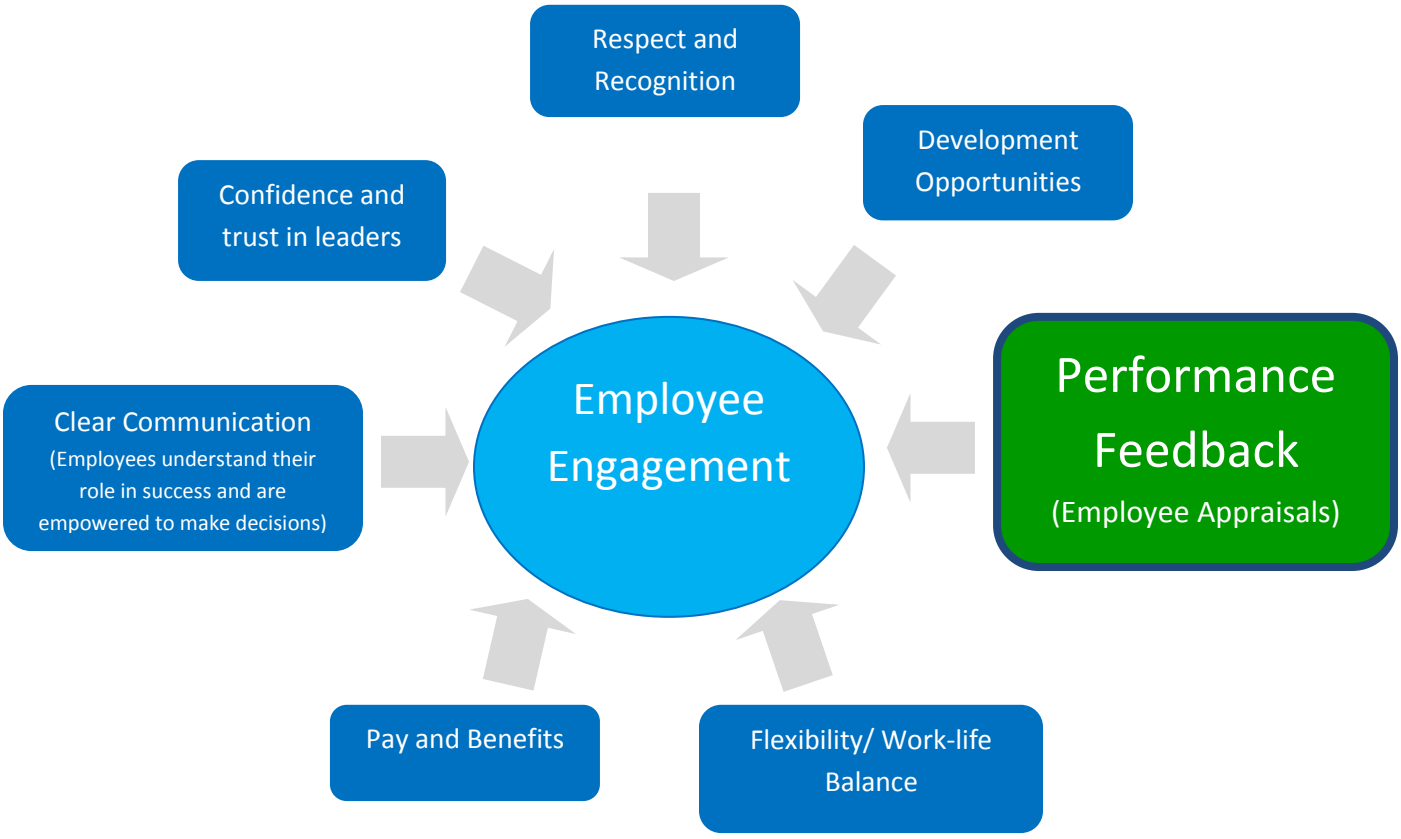
Bullseye Performance Management Appraisal Guide



*Diversity * Inclusion * Innovation * Learning*

August 2015

TSU
Texas Southern University
Office of Human Resources and Payroll Services
Focusing on What Matters Most...PEOPLE

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How to Log In

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

Website: https://my.bepms.com/login.aspx

The company code is: TSU894

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

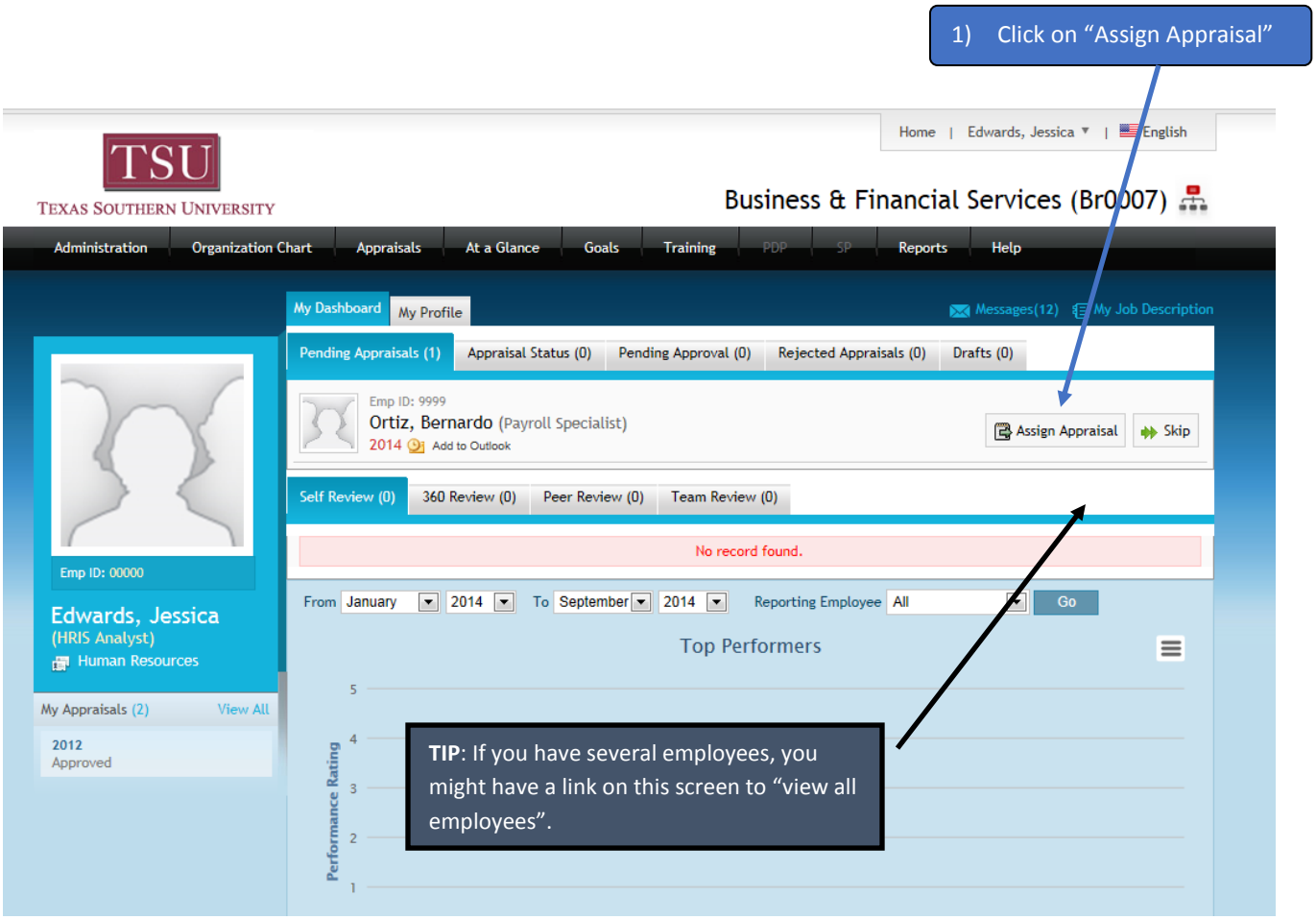
If you do not have your login information:

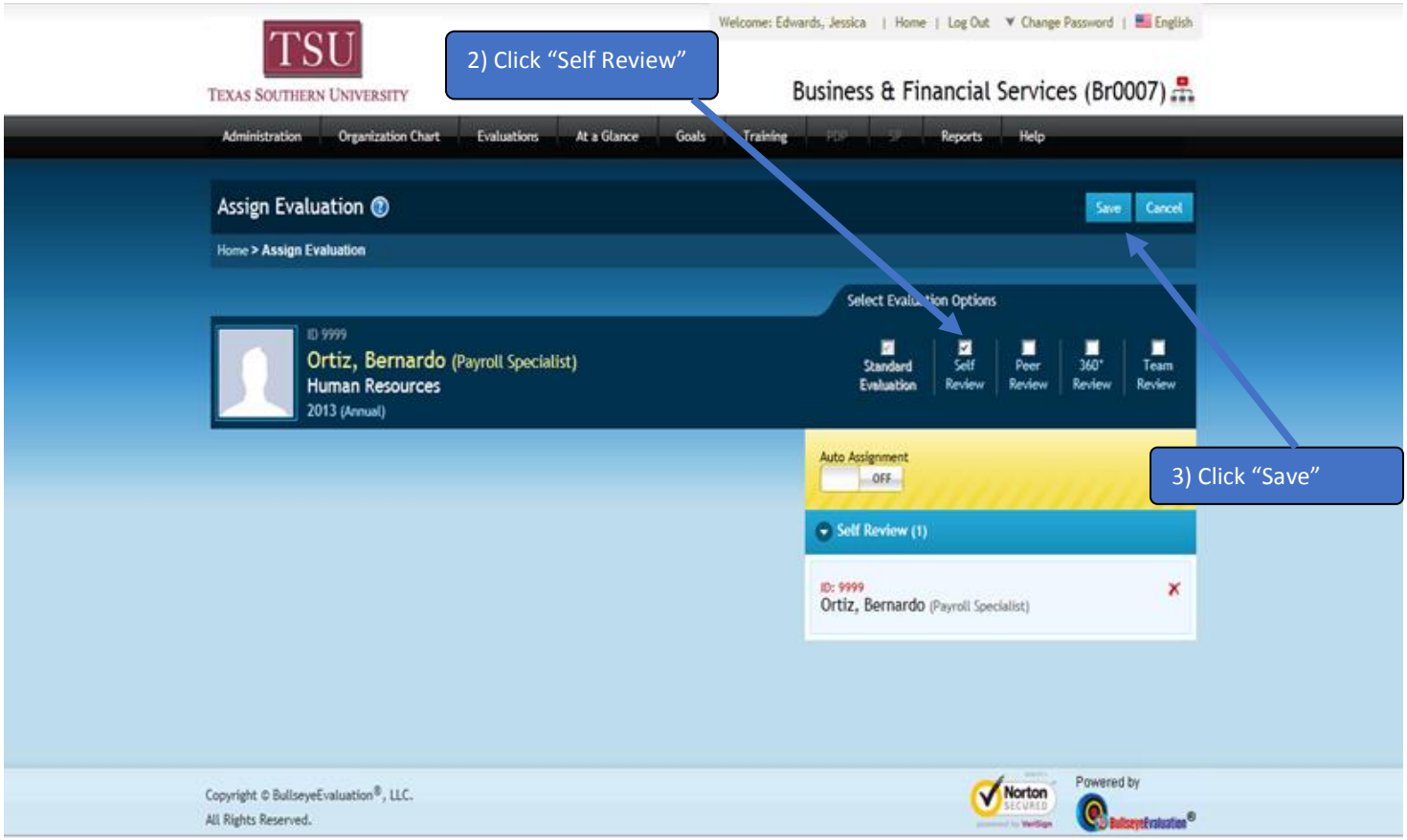
- Ask your manager to send it to you ***OR***
- Enter in your username (first initial and last name) and select “forgot password” ***OR***
- Email HRhelp@tsu.edu

How to Assign a Self-Review to Your Employee (3 steps)

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

1. Click: Assign Appraisal
2. Click: Self Review
3. Click: Save




2) Click “Self Review”
3) Click “Save”
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
Reports
Help
Assign Evaluation
Save
Cancel
Home > Assign Evaluation
Select Evaluation Options
ID 9999
Ortiz, Bernardo (Payroll Specialist)
Human Resources
2013 (Annual)
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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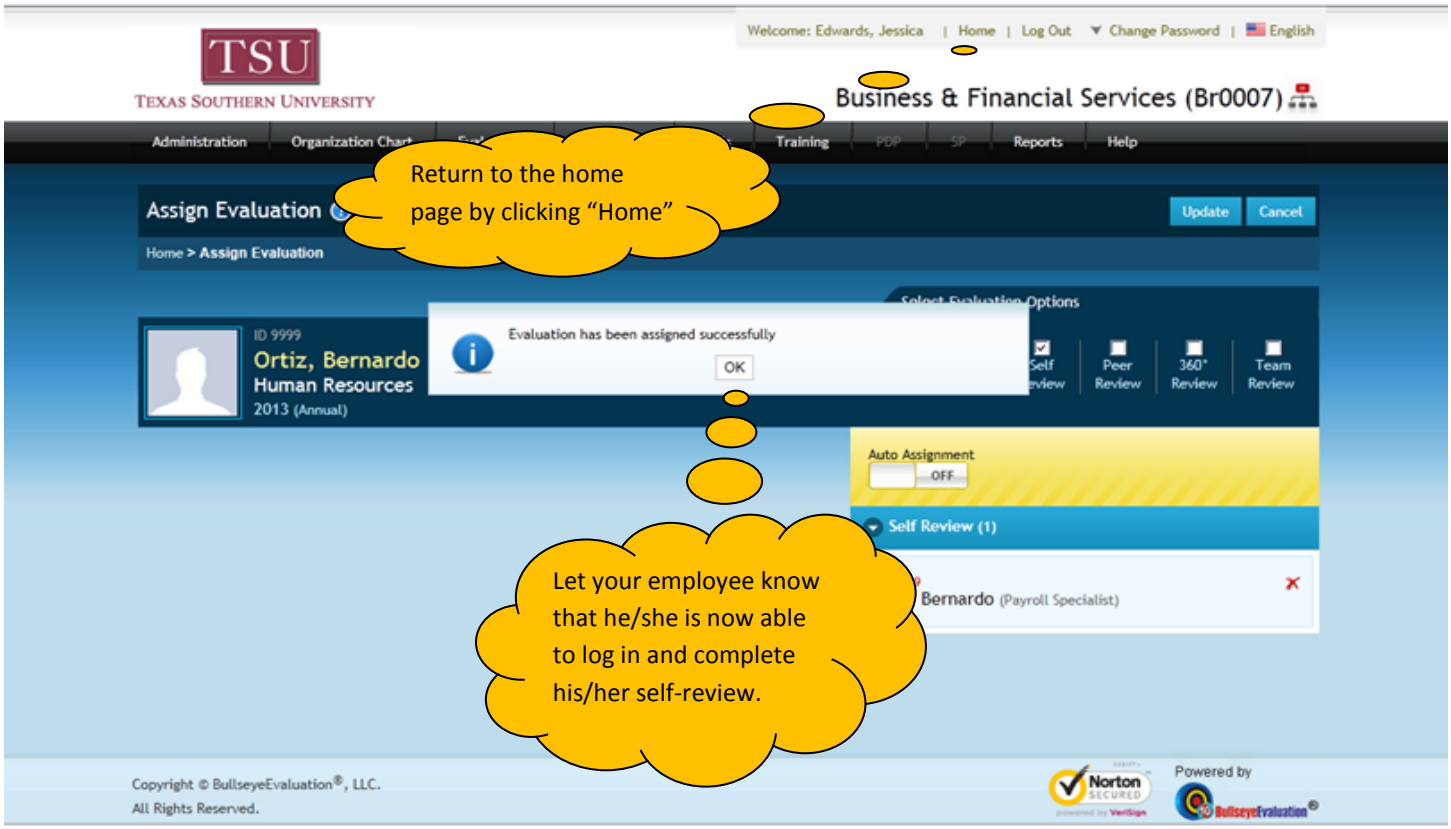
TSU
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Welcome: Edwards, Jessica | Home | Log Out | Change Password | English
Business & Financial Services (Br0007)
Administration
Organization Chart
Training
Reports
Help
Return to the home page by clicking “Home”
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Evaluation has been assigned successfully
OK
ID 9999
Ortiz, Bernardo
Human Resources
2013 (Annual)
Peer Review
360° Review
Team Review
Auto Assignment
OFF
Self Review (1)
Bernardo (Payroll Specialist)
Let your employee know that he/she is now able to log in and complete his/her self-review.
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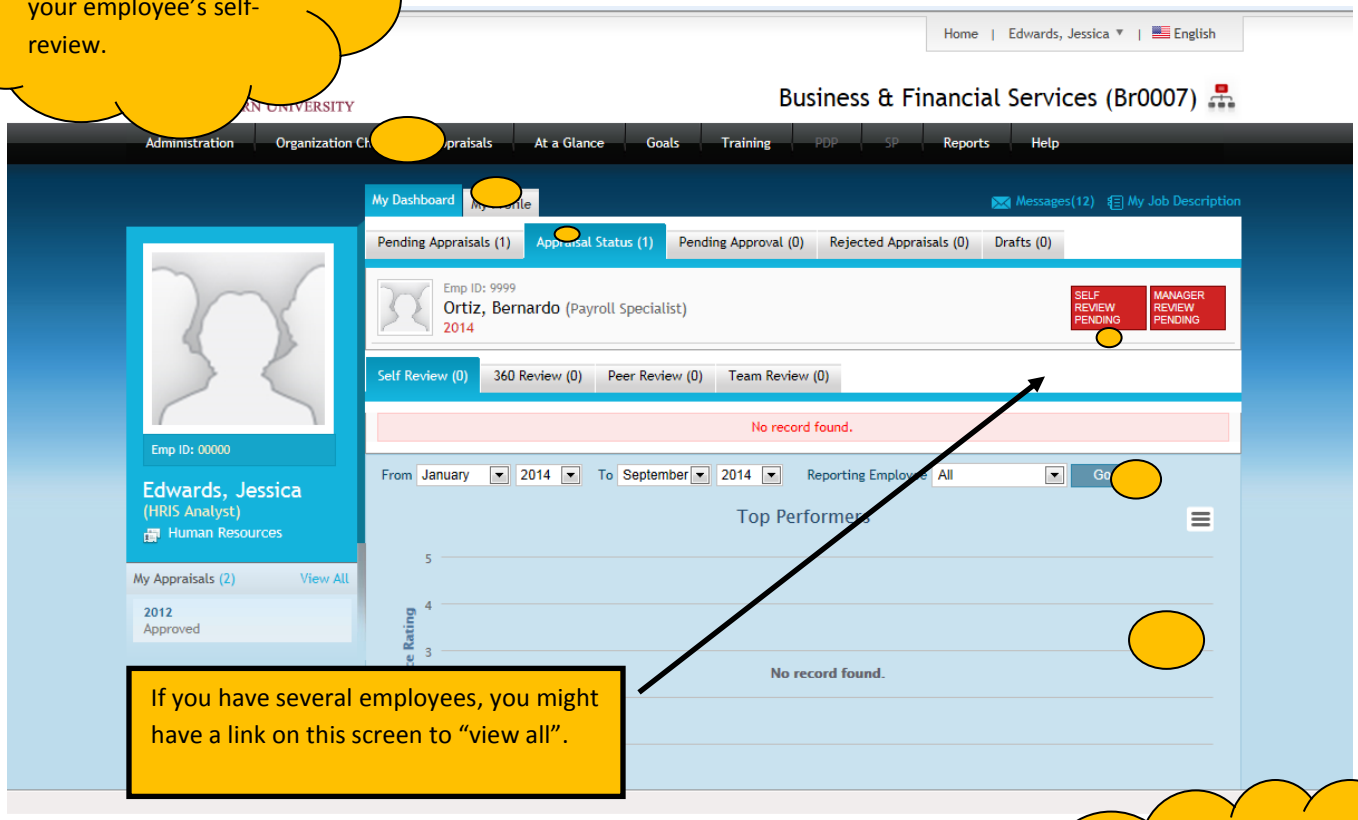
Click on Appraisal Status to check the status of your employee's self-review.



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

Once a self-review has been completed by your employee, this box will turn green and say "self-review complete".

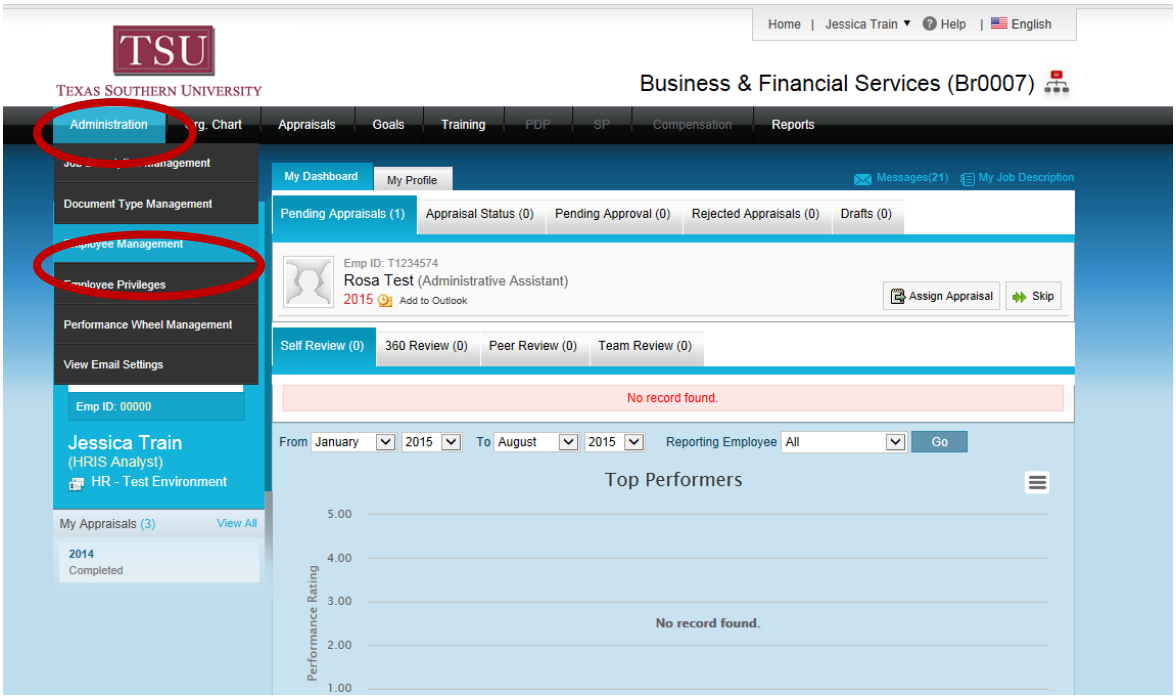
Congratulations – You have assigned a self-evaluation to your employee!

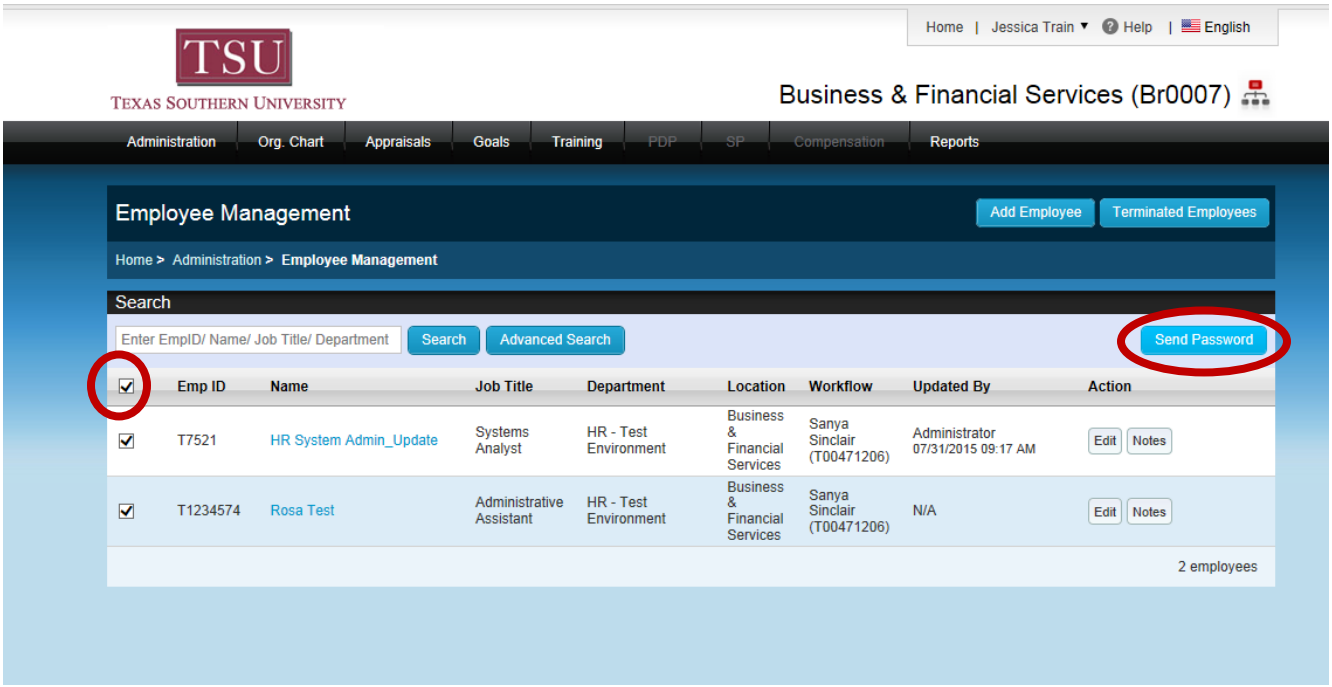
How to Send Your Employees Their Passwords (3 steps)

STEP 1: Click “Administration”

STEP 2: Click “Employee Management”

Step 3: Select employees and click “Send Password”



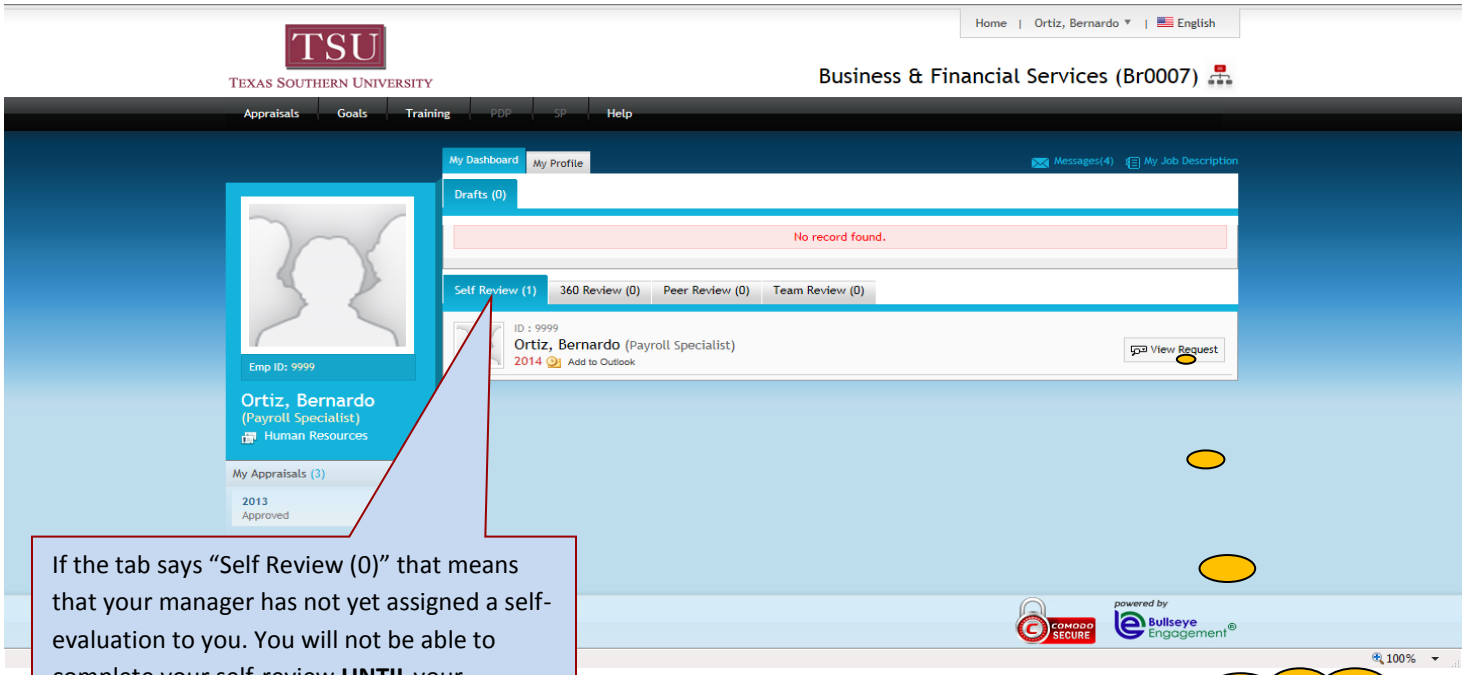


For Employees

How to Complete Your Self Review

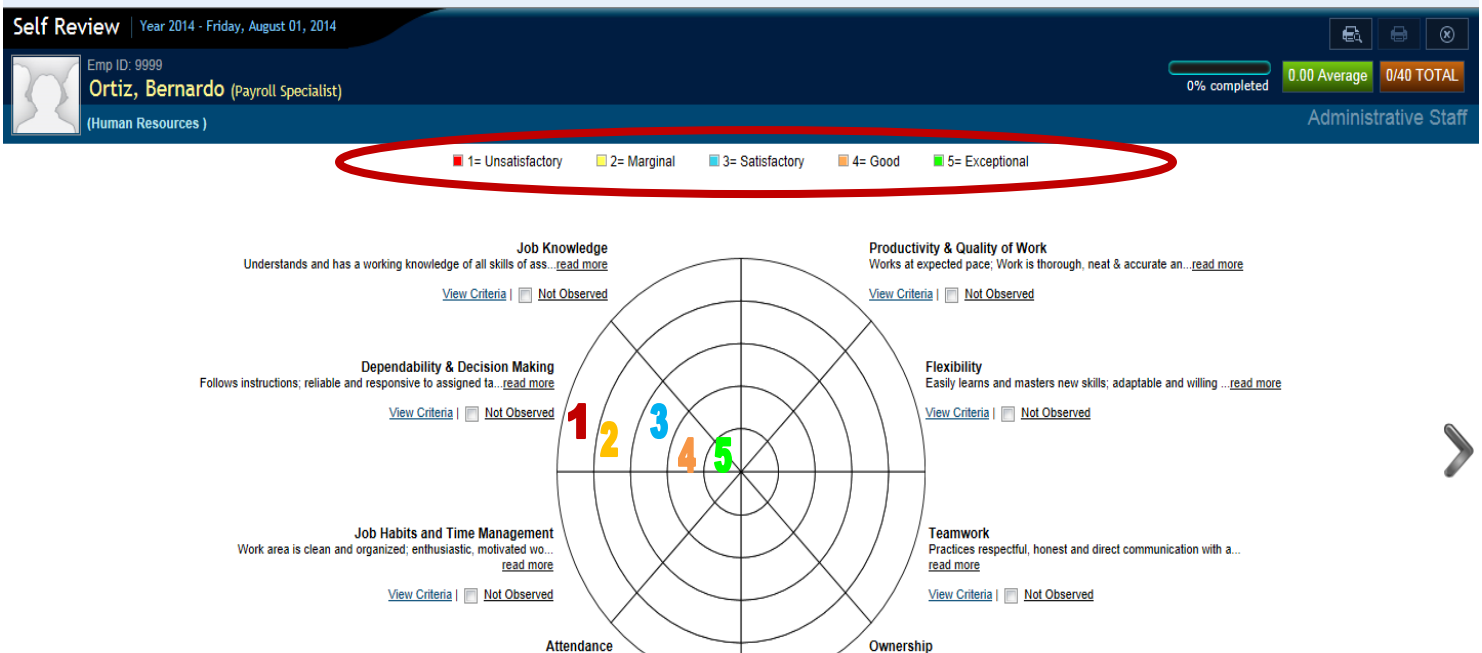
Step 1: Log In

Step 2: Select "View Request"



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".

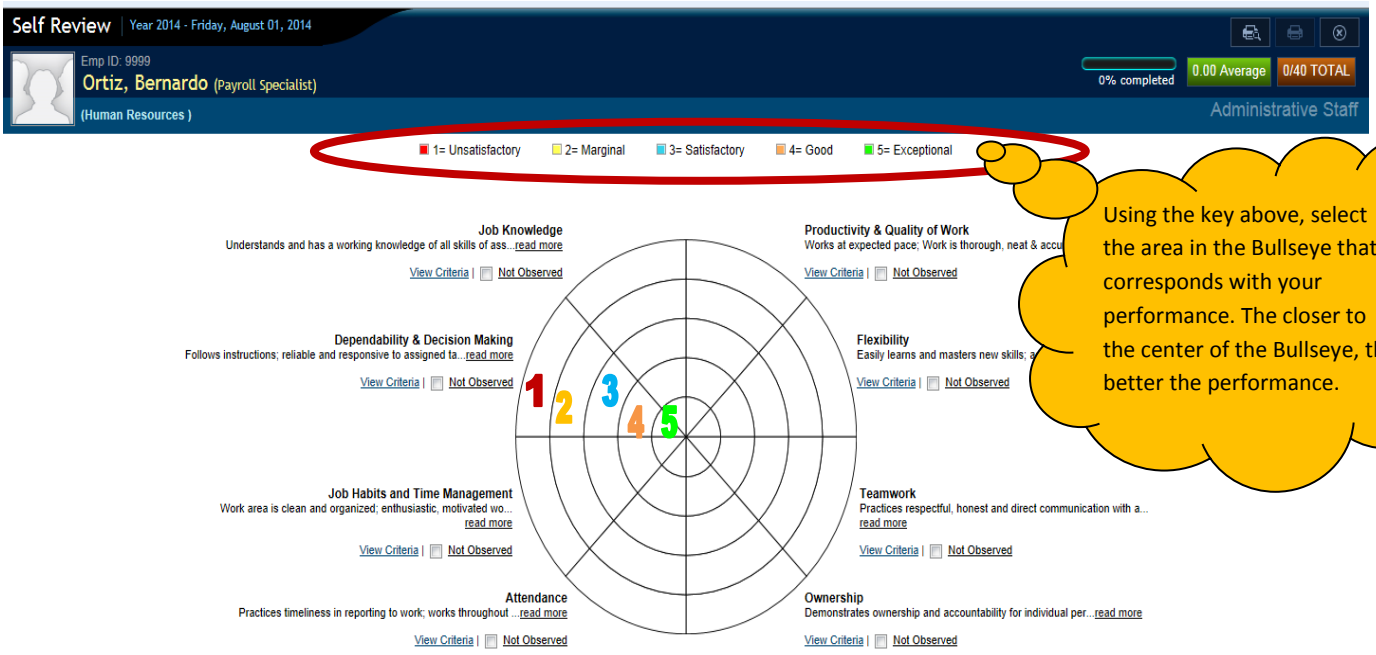


Step 3: Complete the Review

Your self-review 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.

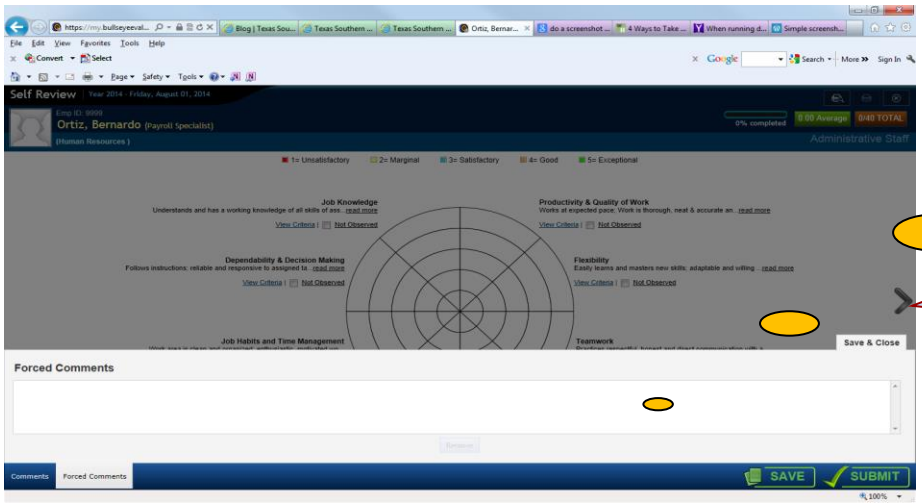
Be sure to point out improvements that you have made over this past year. How have you raised the bar? How have you improved your processes? How have you been innovative? Be sure to highlight this in your review.

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.



Using the key above, select the area in the Bullseye that corresponds with your performance. The closer to the center of the Bullseye, the better the performance.

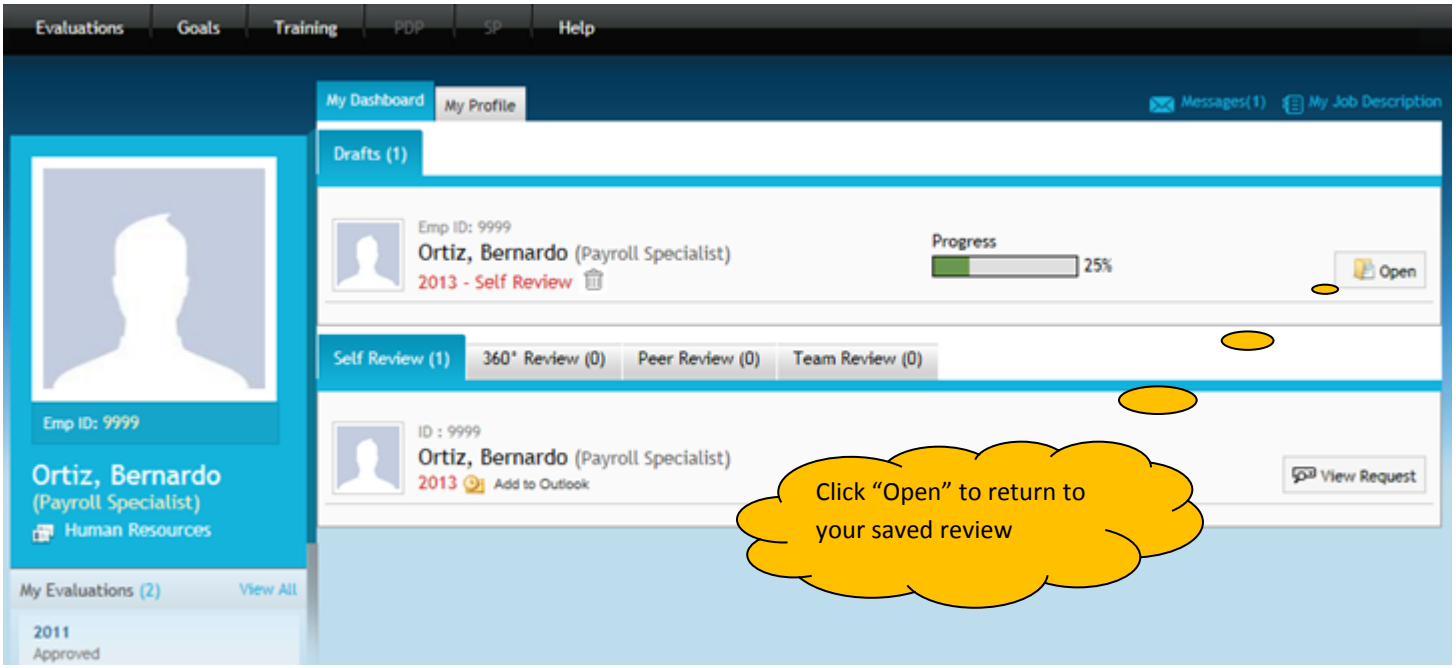
Complete notes for each section of the bullseye. Your notes should be specific, honest, and include examples.



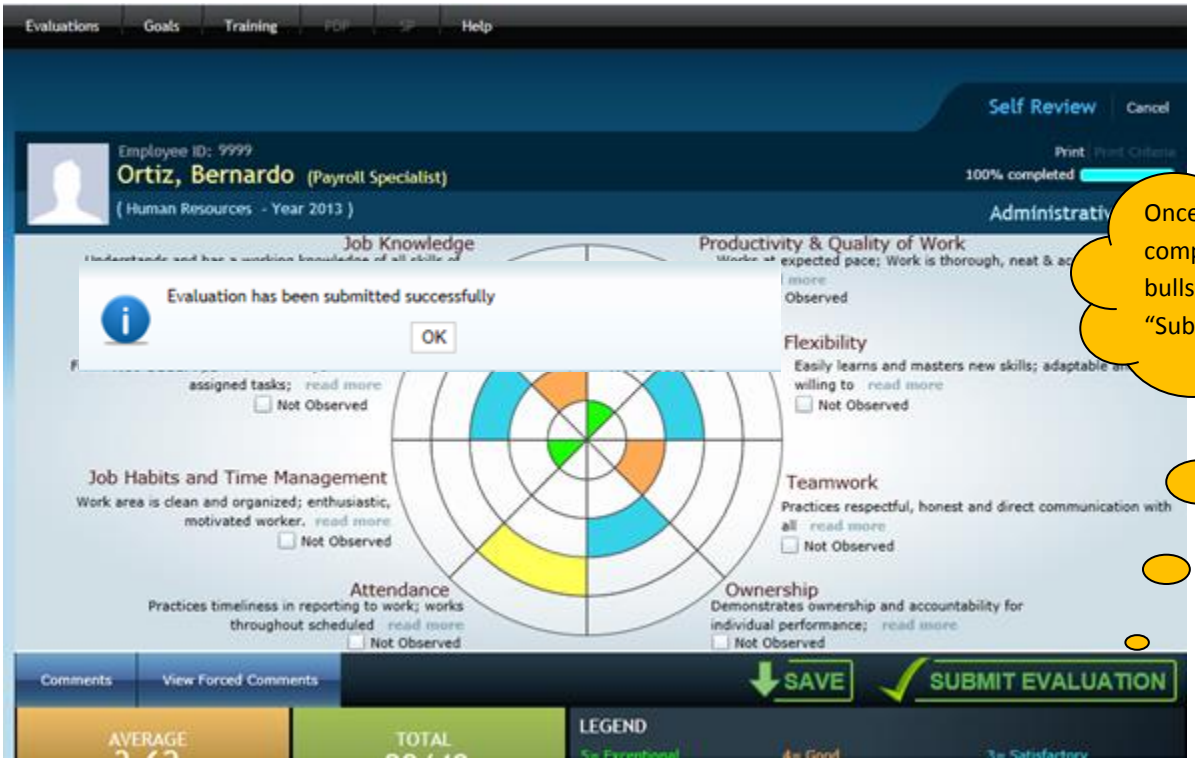
If you are a manager, you'll notice a small blue arrow to the right of the Bullseye. This arrow will lead you to a second Bullseye that you will need to complete.

If you are unable to complete your self-review 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 Review.

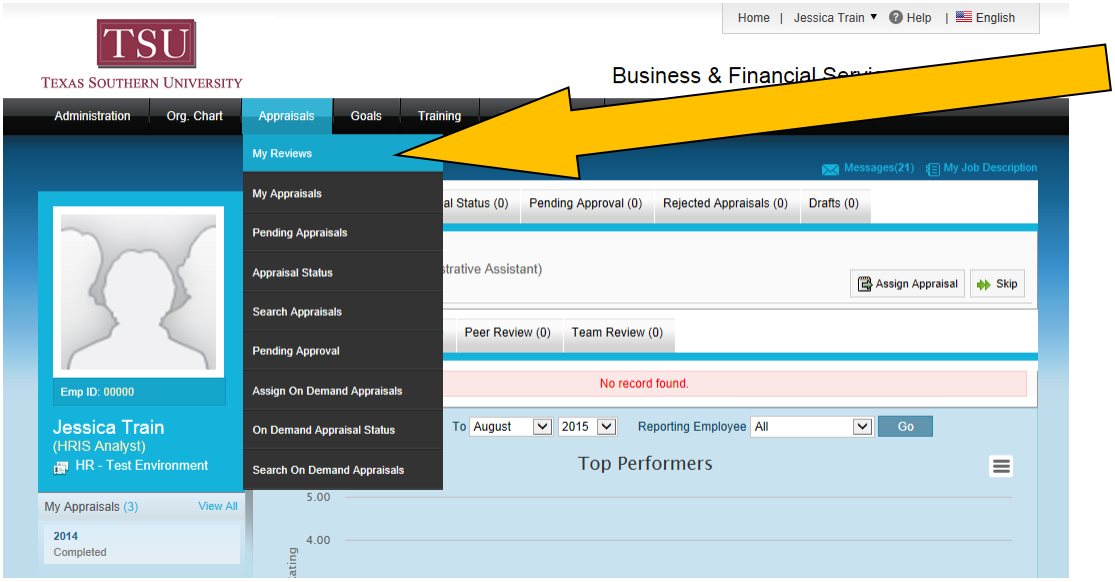


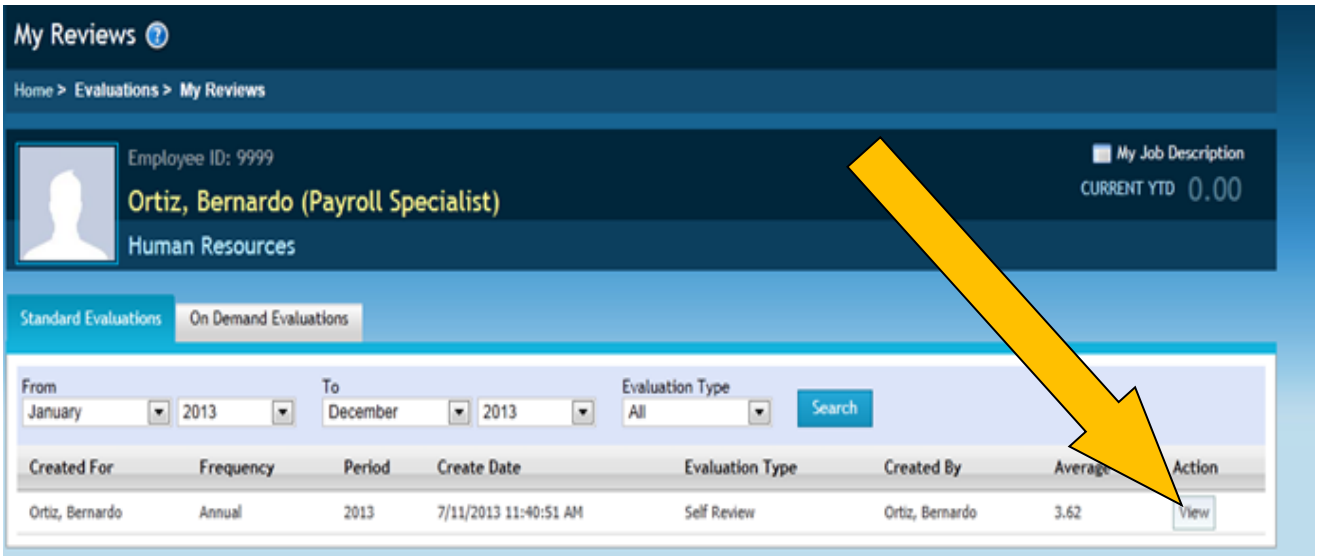
Once you have completed the bullseye, click "Submit".

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

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

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





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

Before you get started on writing a standard appraisal for your employee, you'll need to review their self-review. Employee self-reviews 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-review will give the manager confirmation that their employee is knowledgeable of the department goals and initiatives.

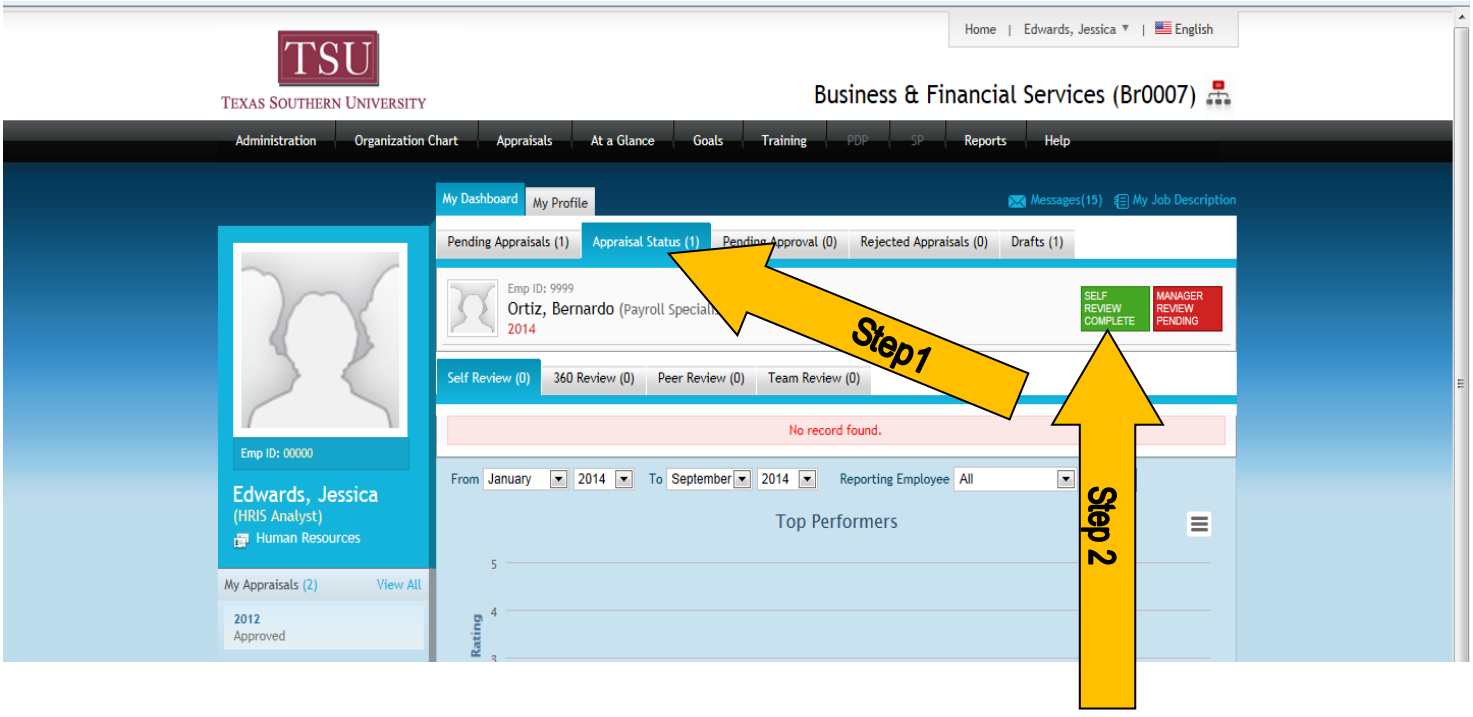
Remember – employees do ***not*** write their own appraisals.

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

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

Step 1 – Click on the "Appraisal Status" tab

Step 2 – Click on "Self Review Complete"

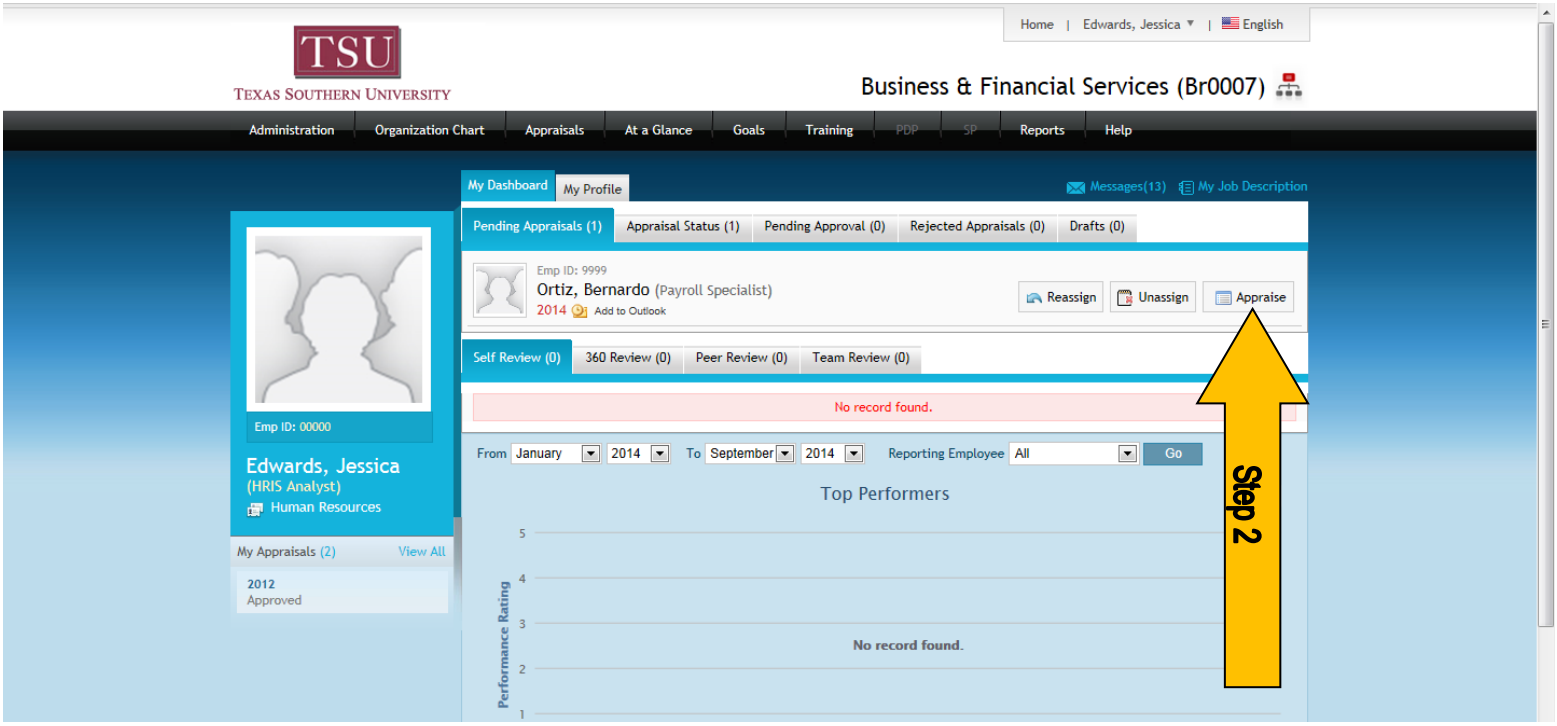


Step 3 – Click the print icon then follow the prompts

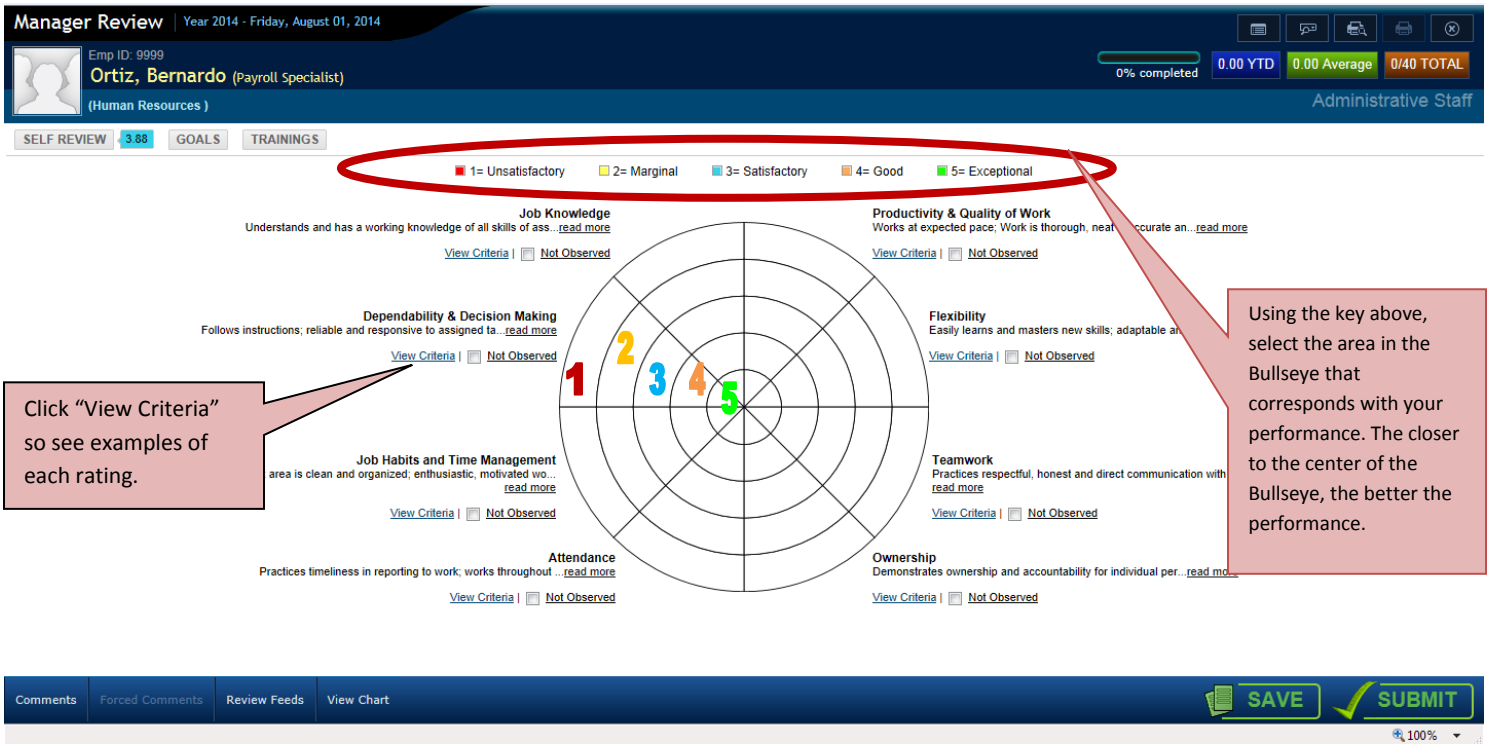
How to Complete a Standard Appraisal

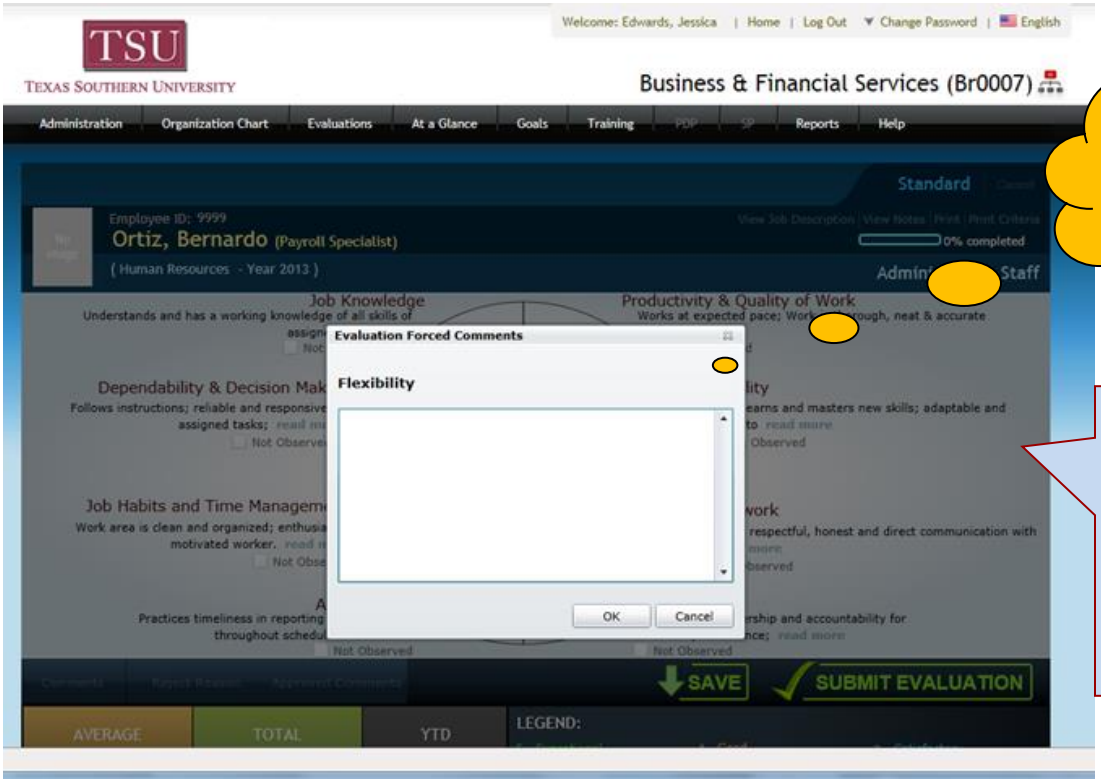
Step 1 – Log In

Step 2 – Click on "Appraise"



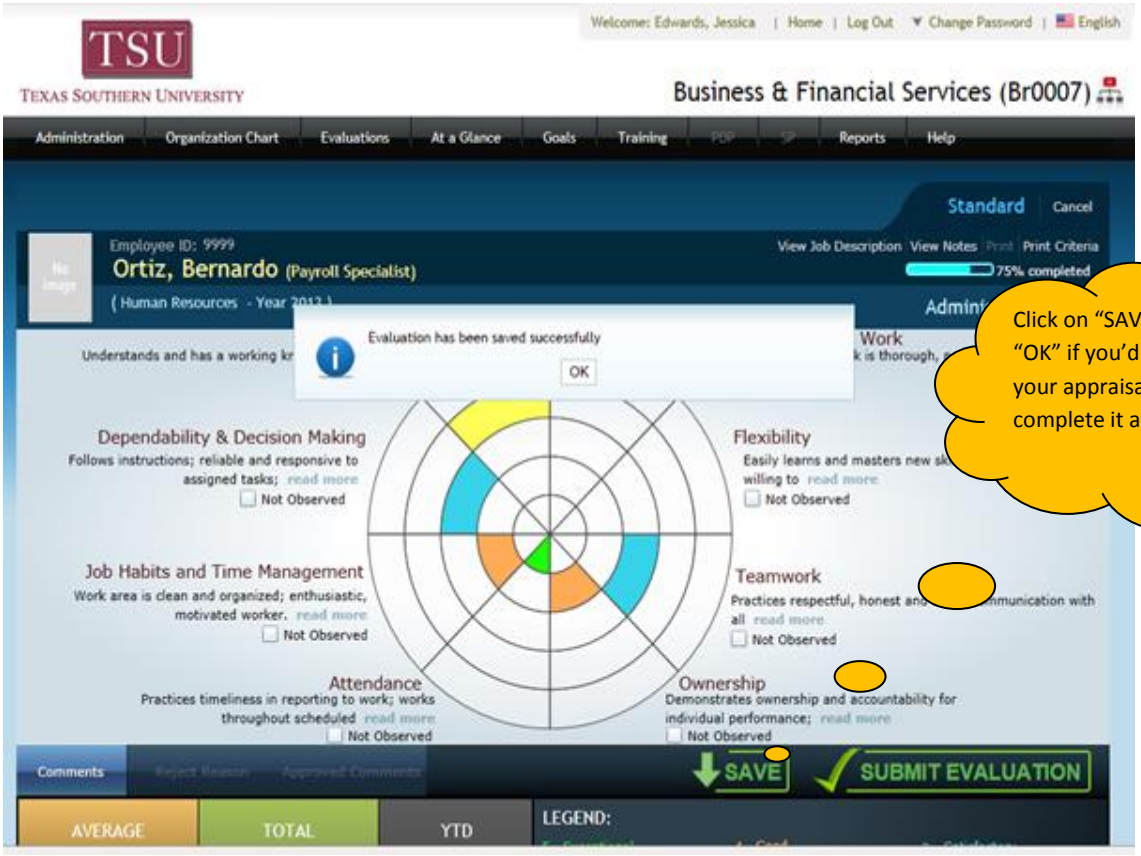
Step 3 – Complete the Appraisal





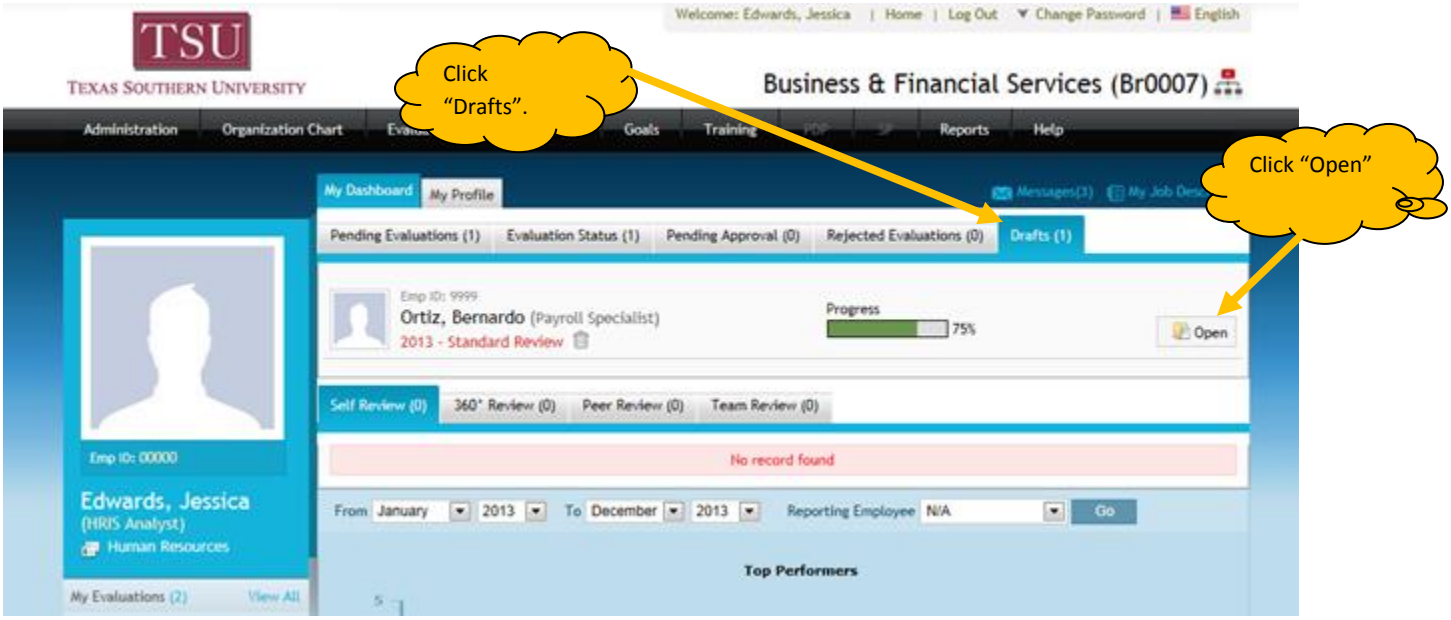
Complete notes for each section of the appraisal. Your notes should be specific, honest, and include examples.

If you are a 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.



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

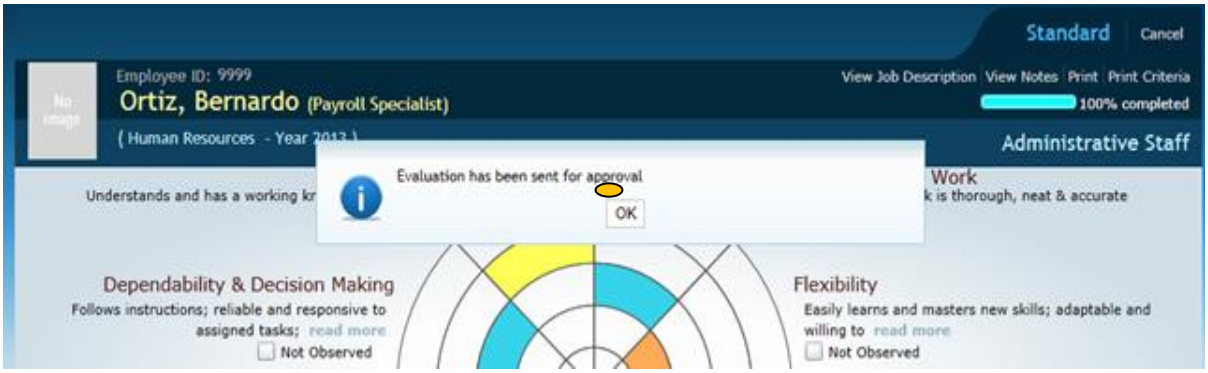
When you are ready to complete the appraisal, log back in to Bullseye, click on “Drafts” then click “Open”



Step 4 – Submit the appraisal

Once you have completed the appraisal, click “SUBMIT”

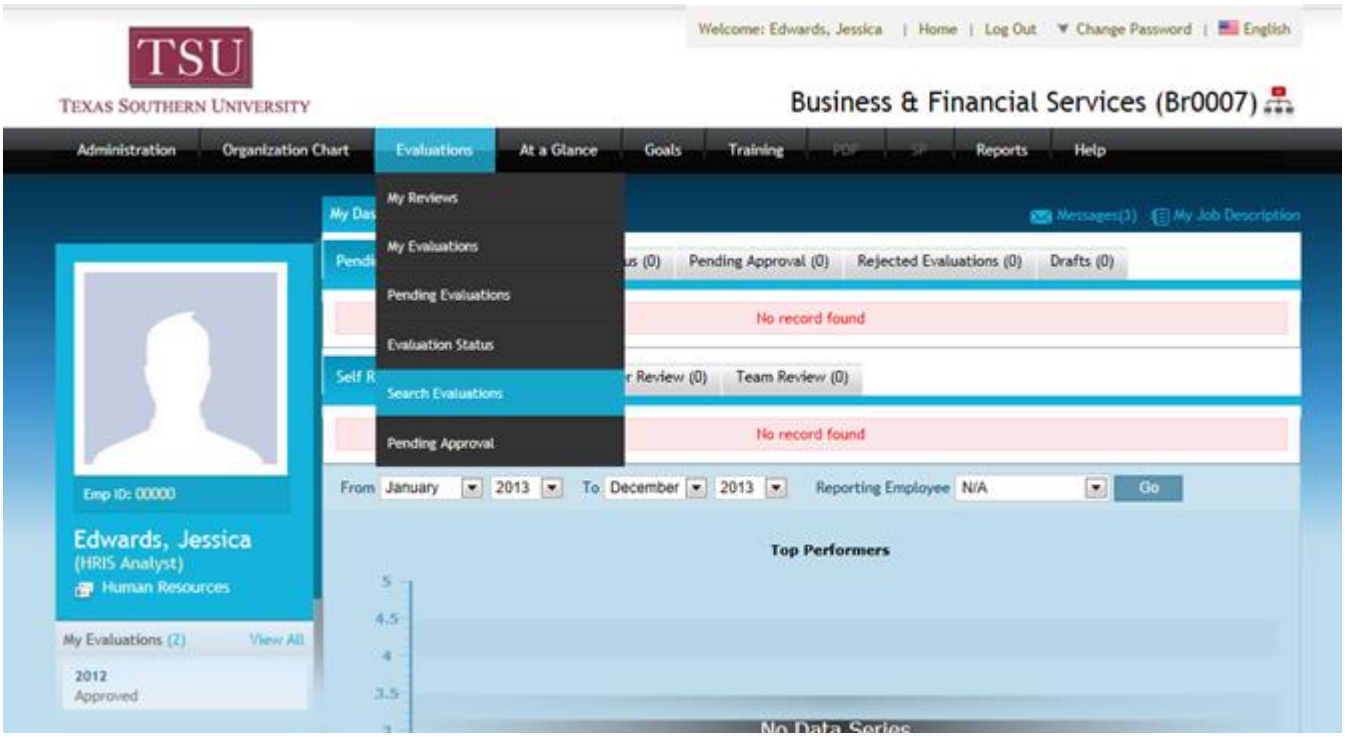
Your evaluation will then be sent to you approver for a final review.



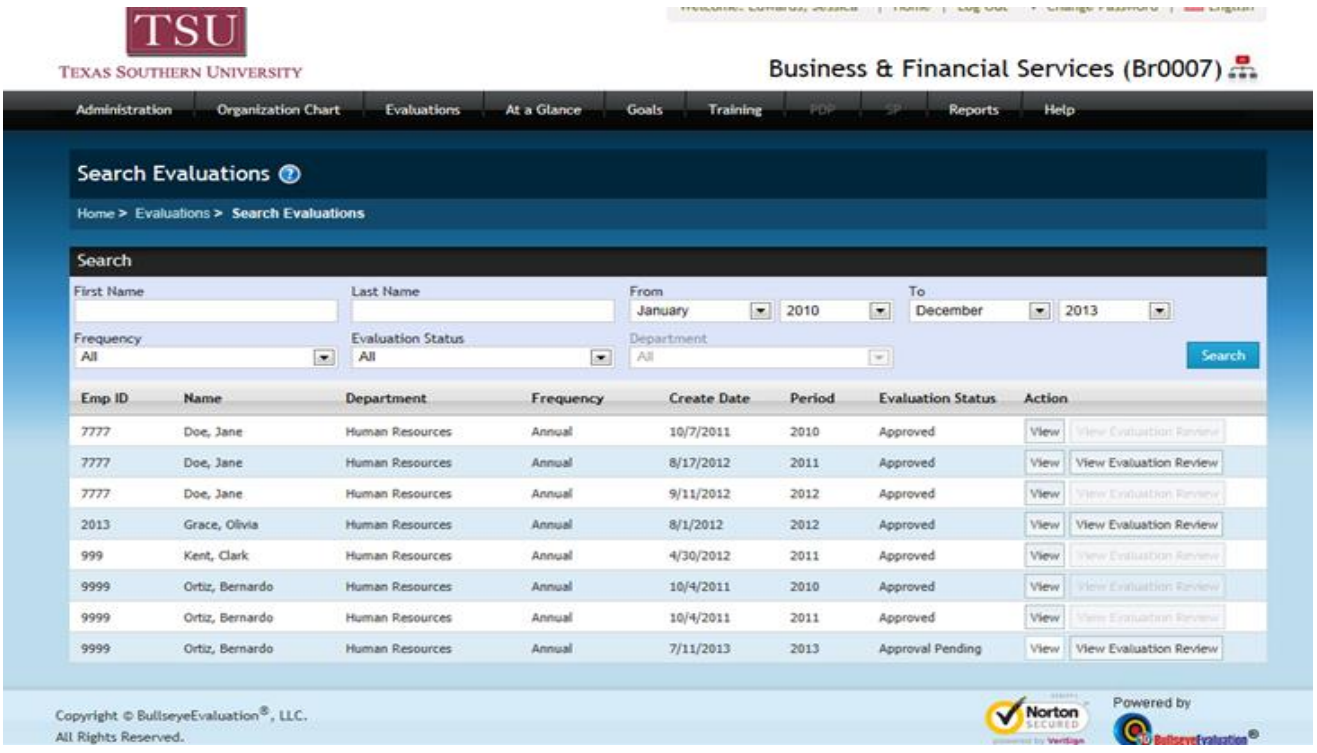
Congratulations – You have completed and submitted your employee’s appraisal!

Review an appraisal you have already written

Step 1: Click on “Appraisals” then click “Search appraisals”



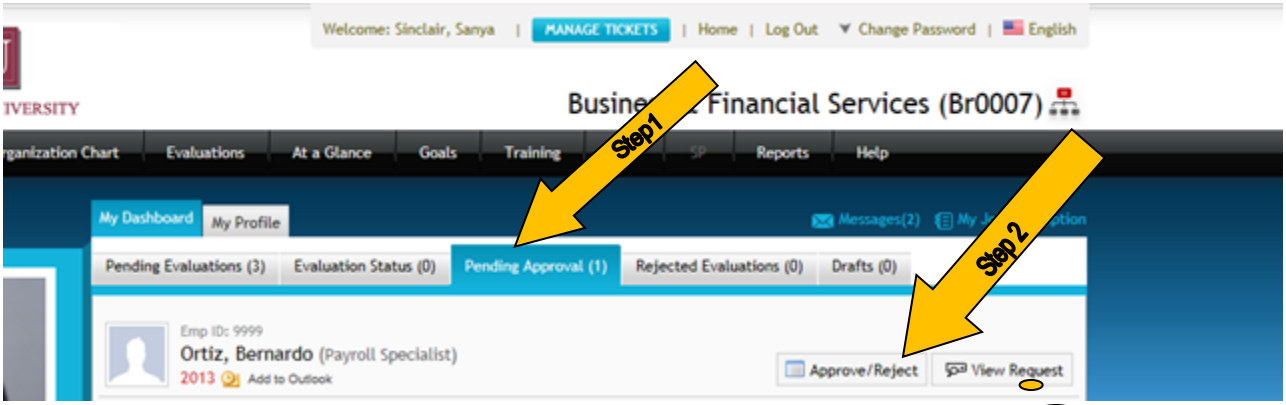
Step 2: Click “View”



For Approvers

Approve or Reject an Appraisal

Step 1: Click on the "Pending Approval" tab



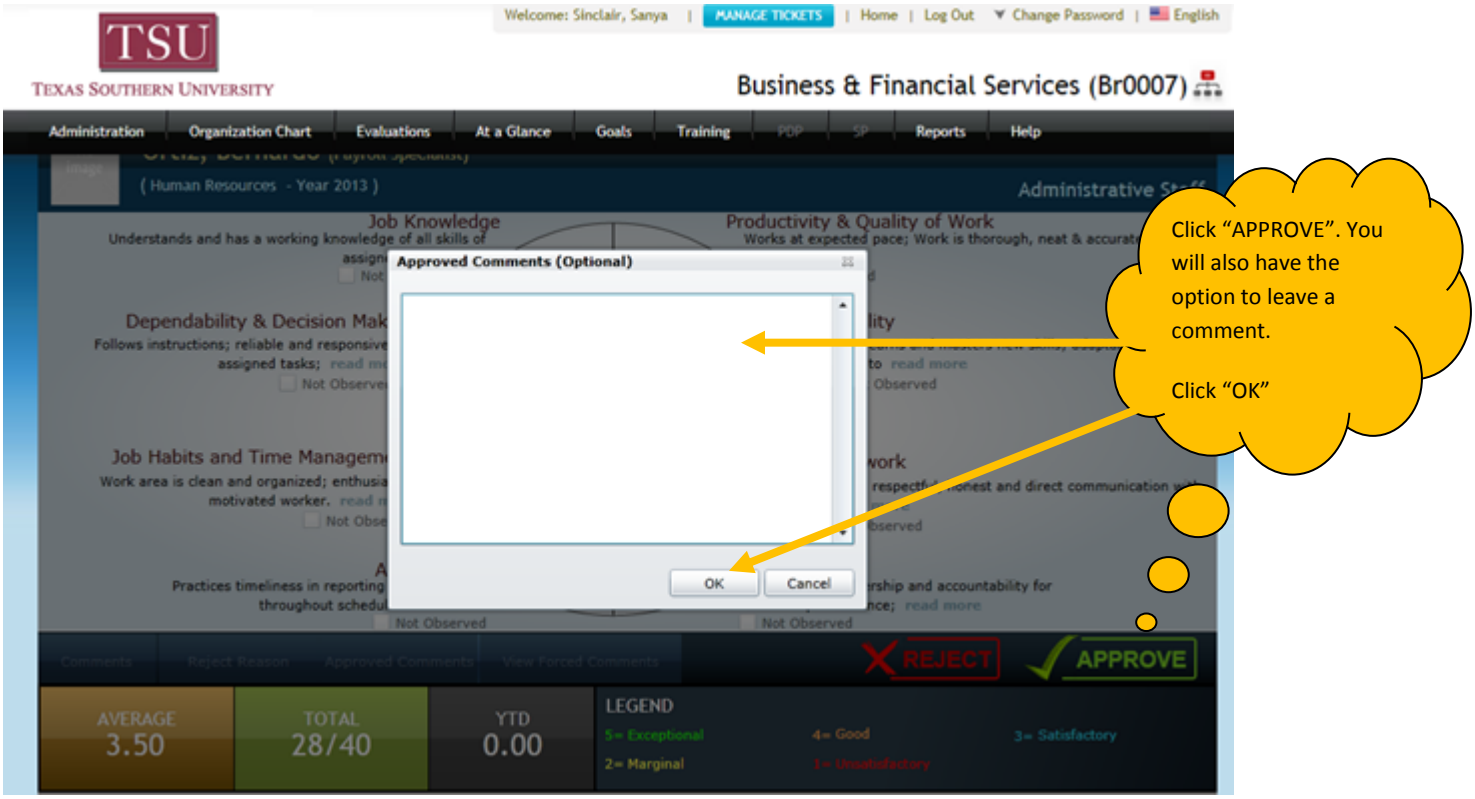
Step 2: Click "Approve/ Reject"

To view the employee's original self-review 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

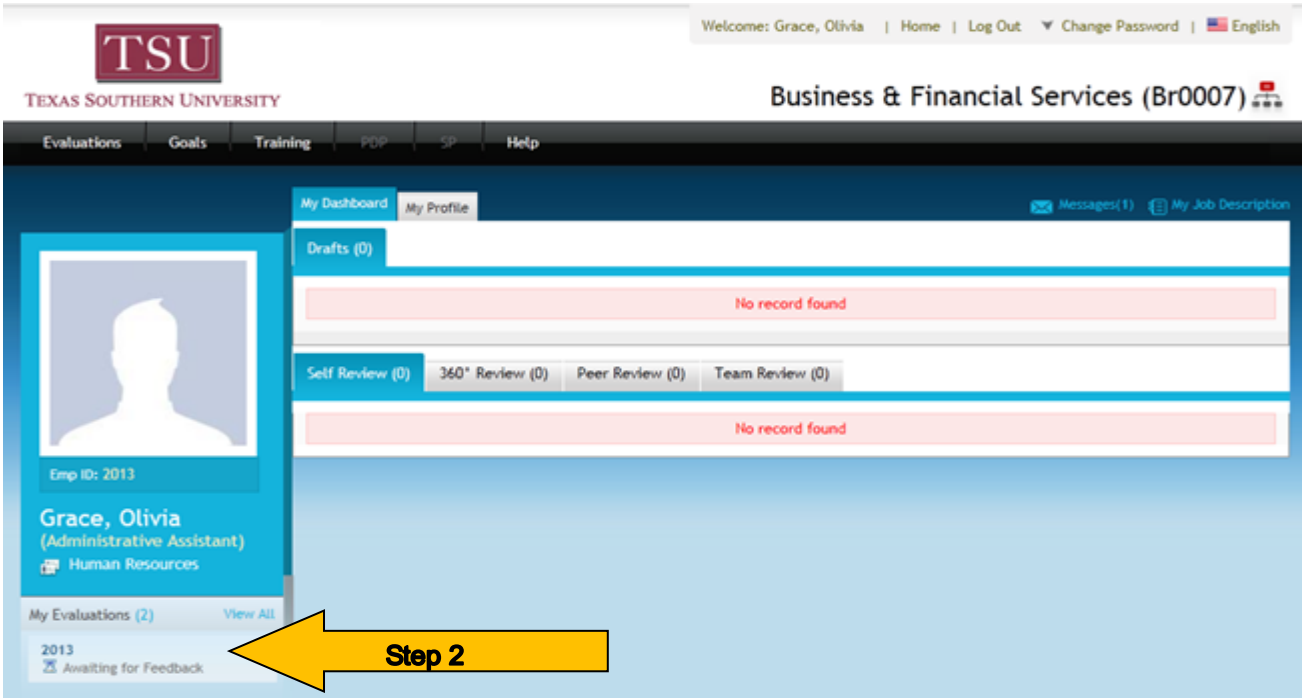


Congratulations – You have completed the approval process.

How to review your appraisal and give feedback

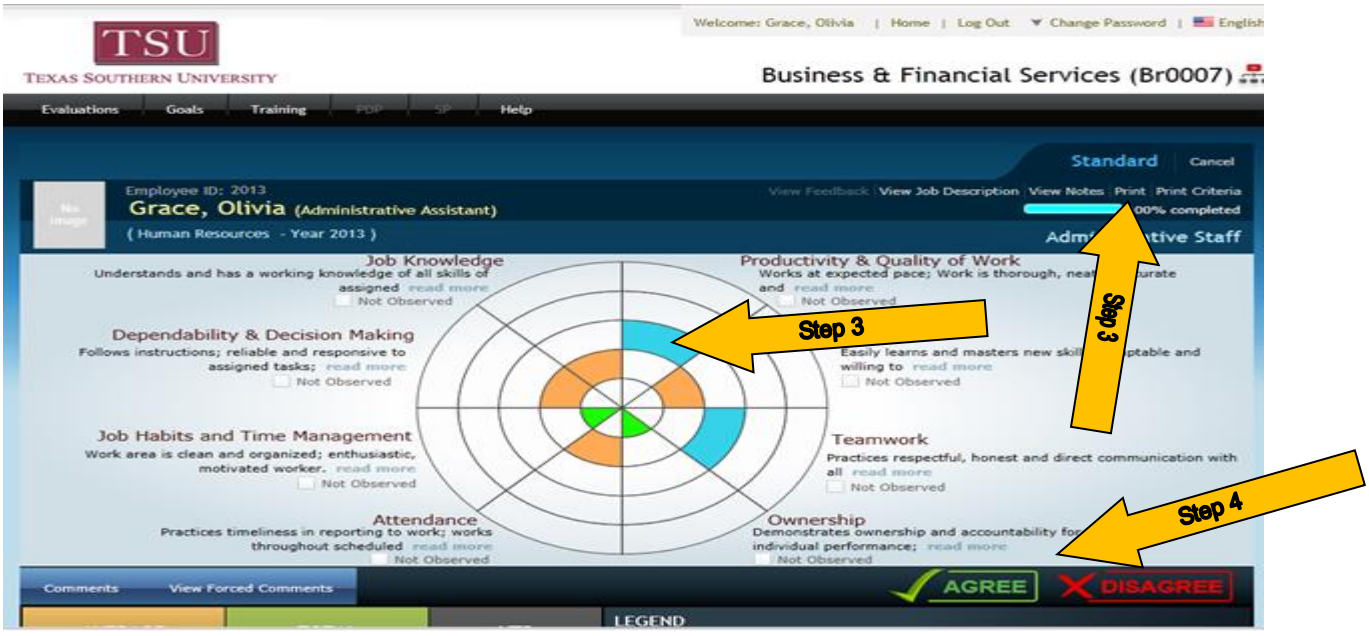
Step 1 – log in

Step 2 – Click on "Awaiting Feedback"



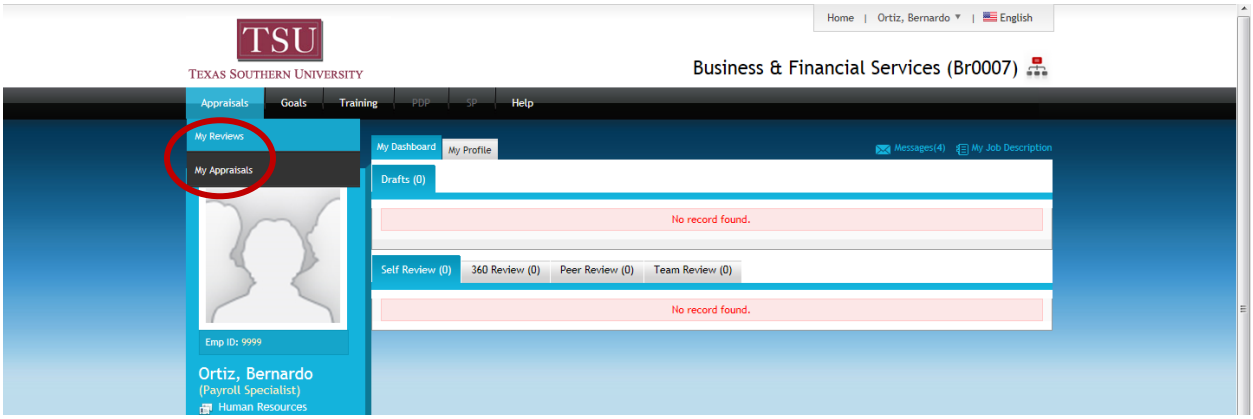
Step 3 – Review the appraisal. You can do this by clicking on each area of the appraisal to see your manager's notes, or you can click on "print" to download the appraisal and review your manager's notes.

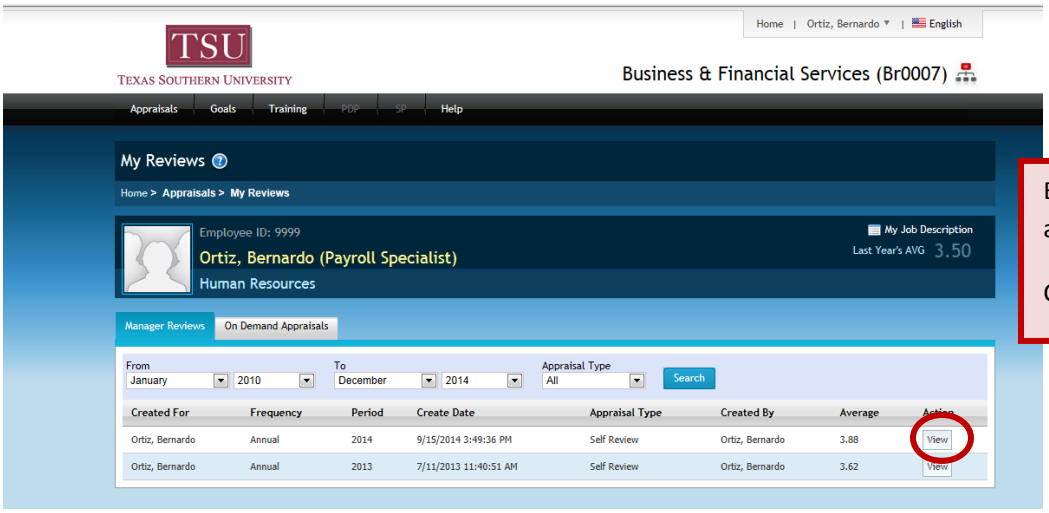
Step 4 - Select either "Agree" or "Disagree" and add in your comments.



How to find an appraisal - **FOR EMPLOYEES**

- **To review all of your past self-reviews:**
  - **Click “Appraise” then Click “My Reviews”**
- **To review all of your past appraisals**
  - **Click “Appraise” then Click “My Appraisals”**



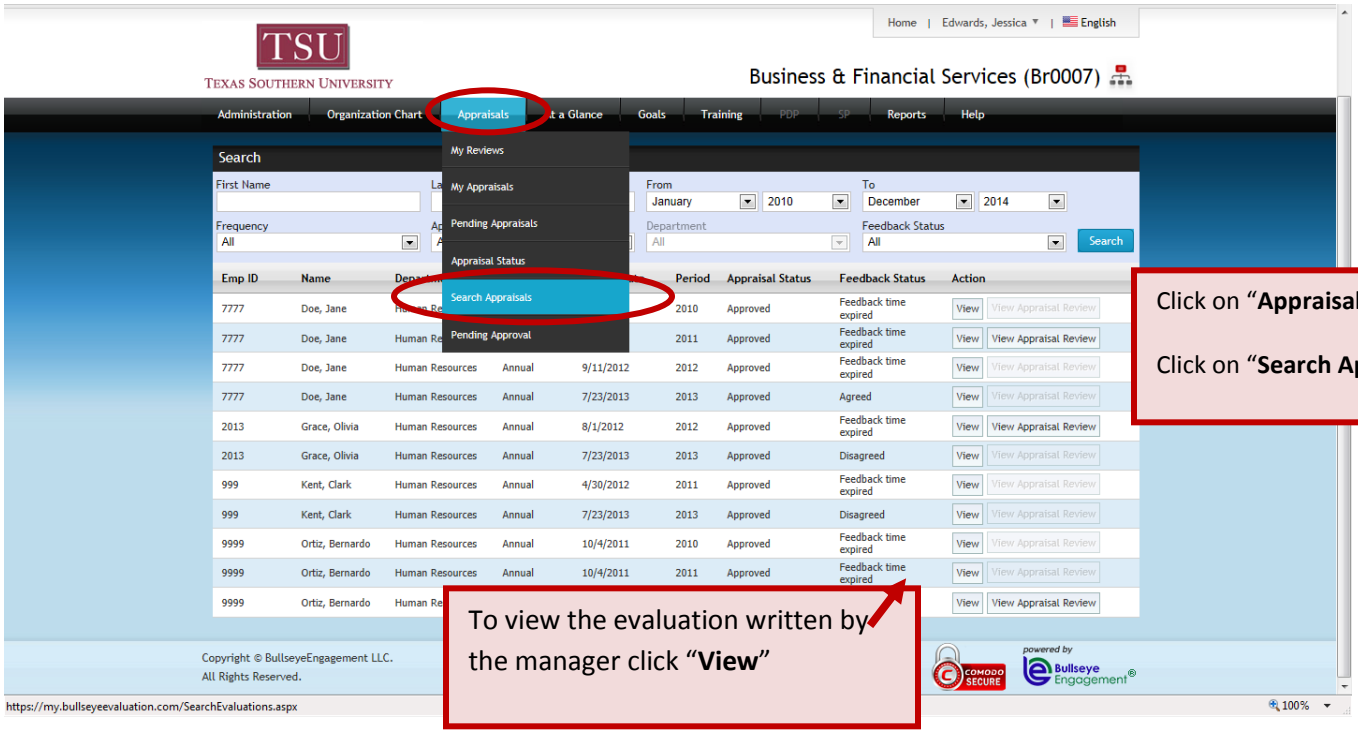


Enter in the appropriate date range

Click “**View**”

How to find an appraisal - **FOR MANAGERS**

Locating an appraisal you have written for one of your employees:

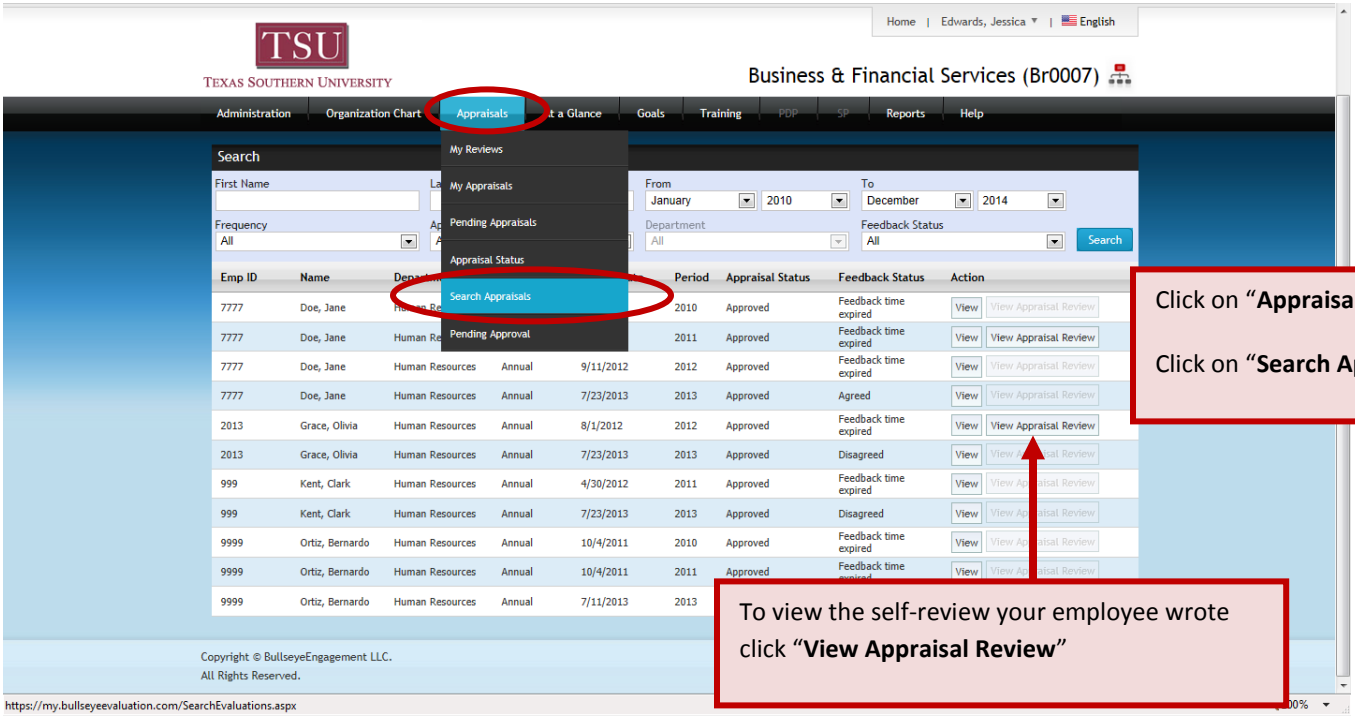


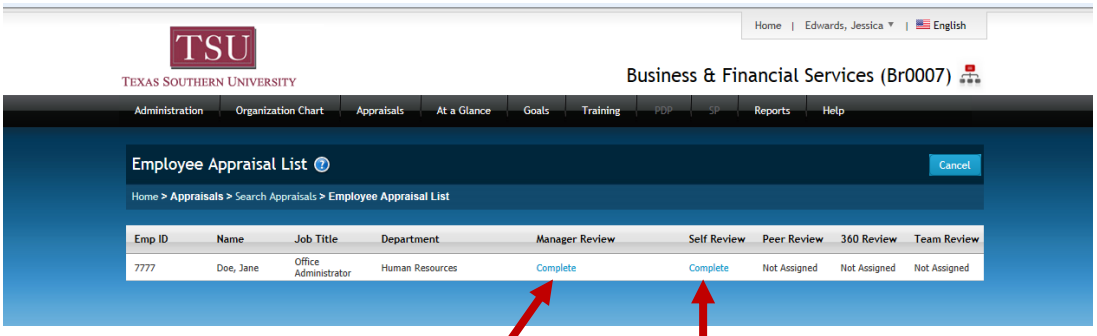
Click on "**Appraisals**"

Click on "**Search Appraisals**"

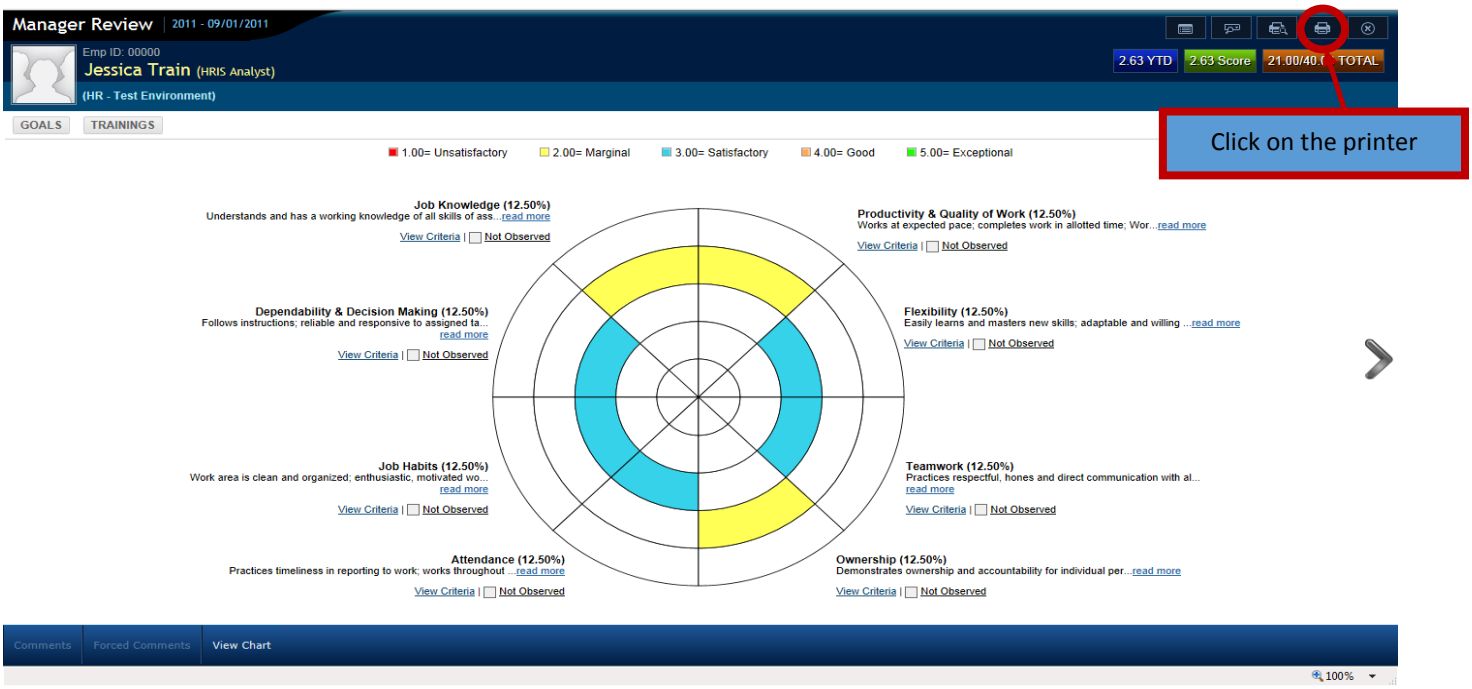
To view the evaluation written by the manager click "**View**"

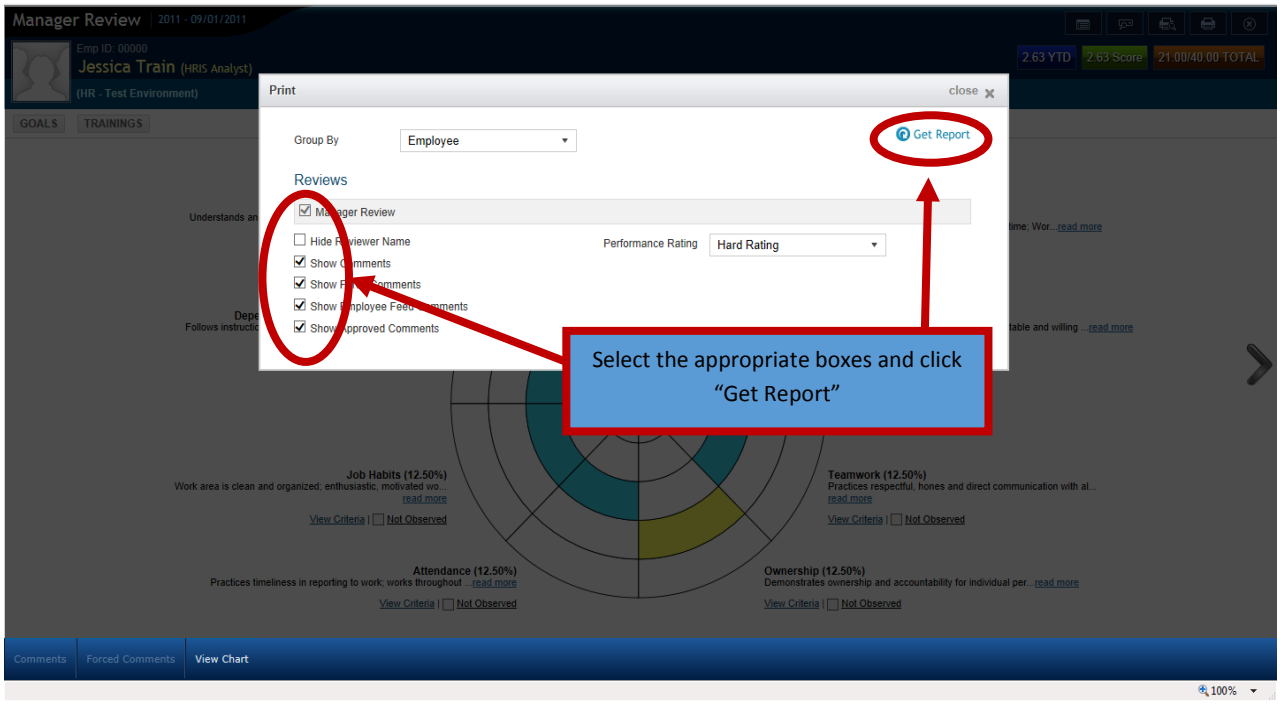
Locating your employee's self-review.

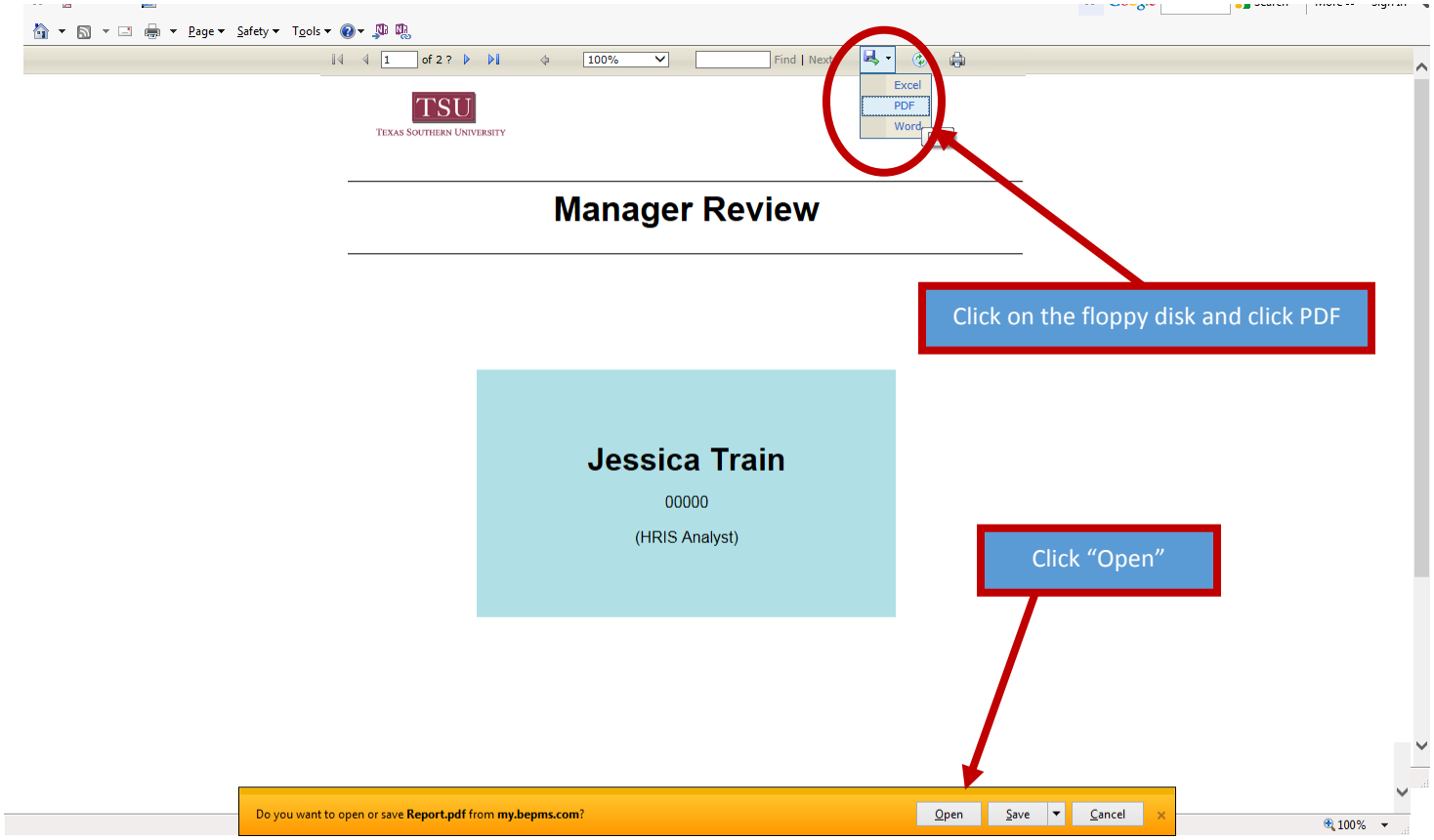




How to Print/Save



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Click “Open”
Do you want to open or save Report.pdf from my.bepms.com?
Open
Save
Cancel
100%

Handling the appraisal meeting – Tips for Managers

The Appraisal 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?