

<b>Slide Number</b>	<b>Transcript</b>
1	Welcome to the tutorial for managers on the new Online Performance Evaluation system. This tutorial will give you the basics of planning and entering your employee's performance evaluation, or PE, online.
2	We now have the PE available online through myUK. The online PE will give you access to your employee's performance information throughout the year. You will be able to document performance in the online format to use during year-end review. The online PE is not intended to replace face to face meetings with your employees. The online form allows maintenance of an electronic record of performance with other employee information in SAP. Both managers and employees will be able to access the form at any time. The online form also provides convenience for reporting overall scores for departments.
3	The purpose of this tutorial is to familiarize you with the online PE process. By the end, you will be able to: access employee PEs in myUK; review and update essential functions and job standards for employee review; and record information on your employee's performance.

4	<p>The online process will mirror the one used for the paper-based form. The PE cycle begins with planning for the year. This may focus on developmental goals and activities to complete during the year, though it could include changes in job standards. This discussion may take place at the end of the previous PE cycle. The second part takes place during the year. This is when you keep track of any noteworthy information regarding an employee’s performance. The last phase of review involves an optional self-evaluation by the employee and assessment by the supervisor.</p>
5	<p>The features you find in the paper-based PE will be found in the online version. Demographic data will be populated automatically in the form. The essential functions and job standards as outlined in the paper form will be listed online as will the weight assigned to each essential function.</p>
6	<p>To access the form you will need to go to myUK. From the “UK Home Page”, you click on the “link blue” link near the upper right corner to go to the “Link Blue” page.</p>
7	<p>From the “Link Blue” page, select the “myUK” link in the left hand column to take you to the “myUK” login page.</p>
8	<p>On the login page, enter your link blue “ID”. This is the same ID you use to log into University Information systems and to access your email. Then hit “Tab” on the keyboard. Now enter your password...</p>
9	<p>And click the “Sign On” button.</p>

10	You are now on the “Launch Pad” page. On this page you will have a tab for “Manager Self-Service”. This is where the online PEs will be accessed. More services for managers will be available here in the future. Click on the “Manager Self-Service” tab.
11	Now select “Performance Management” in the second row of tabs. It can also be selected in the Overview box.
12	This is where you’ll access employee PEs. You can click on the “Show Quick Criteria Maintenance” button to view display options.
13	In the “Quick Criteria Maintenance” area, you’ll see several pieces of information. The “Category Group ID” and “Category ID” default to your division. These will only be needed if you evaluate employees on both the campus side of the University and the Healthcare side. The “Appraisal Template ID” shows the form needed. Most managers will just be using the standard PE, but if you use a Nursing PE form or initiate a Performance Improvement Plan, it will be accessed here.
14	In the “Employee” menu, you can choose employees to view. The “Direct Reports to Appraise” will show all the employees who report directly to you and who you will evaluate. “Employees to Appraise” will show other employees you evaluate, but who are not in your reporting structure. “Direct Reports” show all employees you supervise whether or not you will conduct their evaluation. If you have supervisors reporting to you, under “Second Level Reports” you will see the people who report to those supervisors.
15	The dates you see in the “Valid From” and “To” boxes will allow you to select evaluations from that time period. Once you make any selections in this area, click “Apply” to pull up the requested information.

16	If you make changes in the “Quick Criteria Maintenance” section, they should show up after click “Apply”. If they don’t, click “Refresh” in the lower right corner to refresh the web page. Your selections should now show up.
17	Let’s now go through the table and see what each column tells you. The “Appraisal Status” column shows the current stage of the PE process. There are four stages in this column. “In Planning” is the first stage at the beginning of the year to confirm essential functions and job standards. “In Review” is the stage throughout the year when performance is recorded. “In Process” is the assessment stage, and “Completed” shows that the performance evaluation for the year is completed and acknowledged by all parties. This tutorial will take you through the “In Planning” stage to the “In Review” stage. The “Substatus” column tells you if the PE is currently with the manager or the employee for entering information. The next column shows the employee’s name and the “Document Name” column has the link to the form.
18	Under “Period” you will see the first day of the PE cycle and under “To” is the last day of the cycle.
19	Click the link under “Appraisal Document Name” to go to the employee’s PE.
20	You are now in the PE document which is organized in a tab view. At the top of the PE is a process timeline that will let you know what step you are in with this PE. The “Process Description” section describes the current step you’re in. On the tab “2011 Performance Evaluation”, the steps of the PE process are listed.
21	Above the tabs you will see the words “Administrative Data” and a box to the far right. Click on the box to see the Administrative Data.

22	Under “Administrative Data” you will see much of the same information that is in the table listing your employees. One new piece of information is the “Execution Period”. This shows the dates the PE is open. The period typically starts two months before the PE year and ends after the deadline for completing the evaluations. You will also see a link call “Info”. This shows demographic data for the employee. Click the “Info” link, if you want to see that data.
23	The demographic data is basic information about the employee.
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25	Click the box on the right to close the “Administrative Data” section.
26	Some departments have loaded PE info into the system so the essential functions and job standards only need to be edited and released to the employee for review. If your department has done this, click on the "Pre_Entered" button to see the next steps. If your department has not already loaded the PE info, you will need to enter this information into the system. Press the "Manual Entry" button to see what you need to do next.
27	If you’d like to review the essential function information, please select the appropriate button. If you’d like to see how you add or delete essential functions, or how you enter comments, select one of these buttons. Or if you’re finished with the course, you can press the “Exit Course” button now.
28	Now click the “Essential Functions” tab.
29	If you want to review guidelines for the rating scale, you can click the link provided. If you are ready to begin adding information, click the “Add” button.

30	Here you will enter the essential functions, job standards, and weight assigned. You can type this information into the boxes, or you can copy and paste from an electronic version of the PE.
31	From the electronic version, highlight the information. You will be copying and pasting each box at a time, not all at once, so only highlight the information in one box.
32	Click on the “Copy” icon or use the copy shortcut, “Control C” to copy the information. Go back to the new form. You can use “Alt Tab” to move to the new form.
33	Make sure your cursor is in the correct box. You will need to use the Paste shortcut key, “Control V” to paste the information into the box. Go back to the old form to copy the next piece of information.
34	After copying and pasting the essential function and job standards, you will enter the weight in the “Weighting” box. Refer back to the old form for the weight, if needed. It is important to enter it as a decimal number! Since the weight in this example is 35%, it would be entered as “0.35”. The first essential function and job standard has been completed for this employee. To enter additional essential functions, you would click on the “Add” button and follow the previous steps. We recommend two to five essential functions for each employee.

35	At any point, you may save your work by clicking on the “Save” button. Since you are working via the web, this is good idea to do every ten minutes or so to make sure your data is being recorded in the system and you don’t lose any of your work. If you need to leave for any length of time, click the “Save and Exit Document” radio button and then click on the “Continue” button. If you wish to print the information you’ve entered, you can click the “Print” button. However, it is not necessary to print the PE for official records.
36	When you’ve entered all of the employee’s essential functions and you are ready to release the form for the employee for review, click the “Essential Functions and Job Standards Complete” radio button and then click the “Continue” button.
37	You will notice that the “Substatus” has changed to “Employee Review”. The employee will now need to review and acknowledge the essential functions and job standards to move the PE to the next stage. You will need to let the employee know that the form is ready for their review. You can now move on to your next employee and go through the previous steps, or you can log off of myUK. The “Log Off” link is in the upper right corner. Click on the “Log Off” link...
38	...Then select “Yes” in the pop-up box to confirm that you want to log off.
39	Click on the “Essential Functions” tab to review the information entered in the system.

40	Here you can review the essential functions, job standards, and weightings for each essential function. Scroll down to see the rest of the essential functions. If you need to update any of the information, simply edit directly in the appropriate box. If you need to add an essential function, click the "Add" box and scroll to the bottom to find the boxes for the added essential function, then type directly in the boxes.
41	If you need to add an essential function, click the "Add" button, and scroll down to the bottom to find the boxes for the added essential function.
42	Then type directly into the boxes.
43	You will enter the weight in the "Weighting" box. It is important to enter it as a decimal number! Since the weight in this example is 35%, it would be entered as "0.35". We recommend two to five essential functions for each employee.
44	At any point, you may save your work by clicking on the "Save" button. Since you are working via the web, this is good idea to do every ten minutes or so to make sure your data is being recorded in the system and you don't lose any of your work. If you need to leave for any length of time, click the "Save and Exit Document" radio button and then click on the "Continue" button. If you wish to print the information you've entered, you can click the "Print" button. However, it is not necessary to print the PE for official records.
45	When you've entered all of the employee's essential functions and you are ready to release the form for the employee for review, click the "Essential Functions and Job Standards Complete" radio button and then click the "Continue" button.



46	You will notice that the “Substatus” has changed to “Employee Review”. The employee will now need to review and acknowledge the essential functions and job standards to move the PE to the next stage. You will need to let the employee know that the form is ready for their review. You can now move on to your next employee and go through the previous steps, or you can log off of myUK. The “Log Off” link is in the upper right corner. Click on the “Log Off” link...
47	...Then select “Yes” in the pop-up box to confirm that you want to log off.
48	To delete an essential function, click on the “Delete” button next to the essential function. Be sure that you do want to delete! There is no confirmation of the delete, so information will be erased immediately! If you do delete by accident, you will need to add an essential function and reenter the information.
49	To enter comments during the year, log back into myUK and go to “Performance Management” in Manager’s Self-Service. Click on the link to the employee’s evaluation.
50	To the right is a tab for “Year End Comments”. You may need to scroll over to see the tab. This is where you can keep information throughout the year about the employee’s performance. Click the “Year End” tab.
51	You can enter comments in the “Year End Comments” box. If you do enter comments during the year, they won’t be viewable by the employee until the assessment is complete in the “In Process” stage.
52	There is no limit to the information you can keep here. A scroll bar will appear on the right if you fill the box.

*Quick Reference Card – Performance Management*  
**Online PE Planning Process (Managers)**



53	Be sure to click the "Save and Exit Document" radio button each time you enter comments, not the "Manager Review" button. You won't need the "Manager Review" button until you are ready to begin the assessment at the end of the year.
54	Once you have selected "Save and Exit Document" and hit the "Continue" button, you can log off of myUK.
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56	If you need additional help on using the online form, go to the "myHelp" website for Quick Reference Cards and other aids. If you have other performance evaluation questions, go to the "PE" website for more information.
57	You should now be able to access and navigate your employee's performance evaluations, enter and review essential functions and job standards for employees, and record information on your employee's performance.
58	We want to hear your feedback about this course. Please click the "Course Evaluation" button below to complete a brief survey on the course. Thank you for your participation.