Slide Number	Transcript
1	Welcome to the tutorial for the new online performance evaluation system.
2	The purpose of this tutorial is to familiarize you with the review and assessment phase of the online PE process. By the end, you will be able to: finalize essential functions, complete ratings, enter comments, and send the evaluation for review by the employee.
3	The last online phase is not intended to replace the face-to-face meetings between employee and manager about the employee's performance. It is expected that managers will meet with each employee to discuss their evaluations. Rather, the online form provides a way to manage the information in the evaluation. Employees can fill out a self-evaluation before you do the final assessment. You will also be able to send the PE to a second-level manager for their review before sending to the employee. If needed, you can also create a performance improvement plan in the system.

4	By this point, the essential functions and job standards are entered by the manager and reviewed by the employee. If this has not been done, the appraisal status will be "In Planning". If you see this status, you will need to go through the steps to complete the Planning Phase. See the online training module "Online PE Planning Process for Managers" or the Planning Process Quick Reference Card at the myHelp website if you need guidance on this step. Here you see the Appraisal Status as "In Review" and the substatus as "Employee Year End Review". There will be a couple of steps to do before beginning your year-end review. You may wish to have employees fill out a self-evaluation before you do an assessment. A self-evaluation is a good way for employees to provide their input to the PE. It is recommended that you give employees a deadline to finish the self-evaluation before you begin your review process. Once an employee submits the self-evaluation the substatus will change to "Verify Essential Functions and Weighting." If employees do not submit a self-evaluation, the substatus will remain "Employee Year-End Review" and you will need to move the form back to you for your next step. Click on the PE link to see the form.
5	In the left column you will see a button for "Manager Review". To move the form back to you for the next step, select the "Manager Review" button and click "Continue".
6	You will now see that the "Appraisal Status" has changed to "In Review" and the "Substatus" to "Verify Essential Functions and Weighting." This will be the final step before beginning the review process. You can make any updates to the essential functions and the weights or to verify that they have remained the same. Click on the PE link to see the essential function info.
7	Click on the "Essential Functions" tab.

8	You can now review and make any needed updates to the essential functions, job standards, and weighting. Any updates should come from changes in the duties of the employee during the year and should be communicated to the employee prior to the year-end review. You can enter any updates in the appropriate box.
9	Once you've verified the essential functions and made any updates, click the "Verify Essential Functions and Weighting" button and then click "Continue". When this step is complete no further changes to the essential functions, job standards, and weighting can be made. If you are not done with this step, you can click "Save and Exit Document", then click "Continue". You will not be able to move on to the assessment and rating of the employee until this Verify step is complete.
10	Now the "Substatus" has changed to "Manager Year End Review". You can now go in to the PE to do your assessment. Click on the link to get into the form.
11	Before doing your ratings and comments, you can view the employee's self-evaluation if one was done. Click on the "Self Evaluation" tab to see the employee's comments.
12	You can scroll down to see the employee's comments. There is no action step for the manager to complete in the self-evaluation.
13	Now click on the "Essential Functions" tab.
14	If you want to review the ratings guidelines, you can do so by clicking the link above the first essential function. Below the essential functions and job standards you can enter your rating. The system will only accept whole or half points. For example, you can give a rating of 3 or 3.5, but not 3.25 or 3.6. Any rating that isn't a whole or half point will be rounded to the nearest half point. The form will multiply the rating times the weighting to get the essential function total. You can also add your comments on the employee's performance for this area.

16	Now click on the "Year End Comments" tab.
17	Here you will add your overall year end comments.
18	If you haven't finished the evaluation, click "Save and Exit" then "Continue". Some managers may wish to discuss the evaluation at the computer with the employee before sending it for acknowledgement. If you plan to do this, then you will want to save and exit. If you need to send the PE to a second-level manager for review before sending it to the employee, click "Send to 2nd Level Manager" then hit "Continue". If the evaluation is complete and is ready to go to the employee, select "Send to Employee" and click "Continue". Once the PE is sent to the employee they will be able to see your ratings and comments, and you will be unable to make any changes. If anything needs to be changed after this point you will need to contact the SAP HR Support Team to reset the form. The support team's contact info is on the Help slide at the end of this module. If you are a second level manager who will be reviewing PEs, click the "Second Level Manager" button to the right to see what steps you need to take. Any employee who received less than a 3 on any Essential Function should have a Performance Improvement Plan. If you will need to do a Performance Improvement Plan for an employee, click the button on the right. If you're ready to move on to the next step, click "Continue with Course".
19	As the second-level manager, you can see both your direct reports and your second level reports. To review a PE for a second level report, go to the "Employee" drop down box and select "Second Level Reports", then click "Apply". The ones that are ready for your review will show up with a status of "In Process" and a substatus of "2nd Level Manager Review". Click the link to see the PE.

20	Here all the information will look the same as it does with a direct report. The final score shows up here on the first tab, and the ratings and comments for each essential function are under the essential function tab. You can also review the employee's self-evaluation. As the second level manager you will not be able to make any changes in the system to what you see in the ratings and the self-evaluation. You can make comments in the "Year End Comments" tab. Click on the tab to see the year-end comments.
21	Here you can add your comments to the manager's. Keep in mind that these comments will be seen by the employee when the PE is submitted for the employee's review. If you see revisions that need to be made in the PE by the employee's manager, you can send the PE back to the manager by selecting "Return to Manager for Revisions" and then click "Continue". Be sure to communicate with the manager directly any revisions that need to be made.
22	To submit back to the Manager, select "Submit" and then "Continue". The manager will then send the form to the employee.
23	You will need to create a Performance Improvement Plan form for an employee. To do so, click the "Create" button above the list of employees.
24	Now click the arrow for the "Appraisal Template" drop-down box. Select "Performance Improvement Plan" in the list.
25	Select the employee needing the Performance Improvement Plan by clicking the square next to the employee's name. Now click "Create".
26	The Performance Improvement Plan shows up as a document for that employee. It is a separate document from the Performance Evaluation. Click the link to go to the form.

27	First you will select the purpose of the Performance Improvement Plan. Click the arrow for the drop down box. The list starts with "Coaching" as the purpose. The next items are the steps in the corrective action process. If the Performance Improvement Plan is part of a corrective action, you can use the form for that purpose. If it is only part of the Performance Evaluation, select "Coaching" as the purpose.
28	Now click the tab for "Section One…" to fill out the form.
29	Here you will describe the essential function and job standards needing improvement, the improvement needed, and steps the employee should take to improve their performance. This process can take time as you decide on the improvement needed and the steps the employee needs to take. If you're in the document more than 10 minutes, it's a good idea to click the "Save" button in the upper left corner to save your work. If you need to finish the plan another time, click "Save and Exit Document", then click "Continue". Otherwise, click "Submit" and then "Continue" to send the form to the employee.
30	If you now need to see the second level manager steps or the Performance Improvement Plan steps, click the appropriate button. Otherwise, click "Continue with Course" to go on to the next slide.
31	The PE is now ready for the employee's acknowledgement. Again, if any information needs to be changed at this point, the form will need to be reset by the SAP HR Support Team. The acknowledgement only shows that the PE has been reviewed by the employee and does not imply agreement with the ratings or comments. The employee will also be able to add their own comments to the PE.
32	Once the PE is acknowledged by the employee, the "Appraisal Status" is now "Completed" and the form cannot be changed by any party.

33	If you have technical problems with a form or need a form to be reset, contact the SAP HR support team at the email address below. Resources about the online form are available at the myHelp website, and more information about conducting performance evaluations is available at Training & Development's PE website.
34	You should now be familiar with the online PE and be able to: finalize essential functions, complete ratings, enter comments, and send the evaluation for review by the employee.
35	We would like your feedback about this course. Please click the "Course Evaluation" button to provide your feedback. Thank you for participating in this web-based training. You can click the "Log Off" button to close the course and to confirm your participation.