

Quick Reference Card – Performance Management Overview of Manager's View



Process: This process provides an overview of the manager's view of the performance management online system.

Role: Managers

Frequency: When needed

Navigating to the Performance Evaluation

On the main UK home page (<http://www.uky.edu/>), click on **link blue**



Click on **myUK**



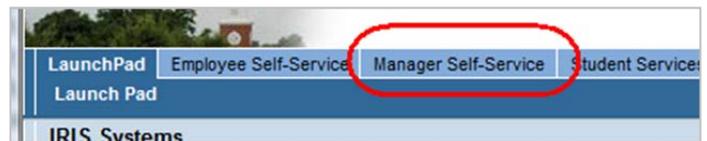
Enter your link blue (AD or MC User ID) **User ID** and **Password**



Click **Sign On**



Click on **Manager Self-Service**

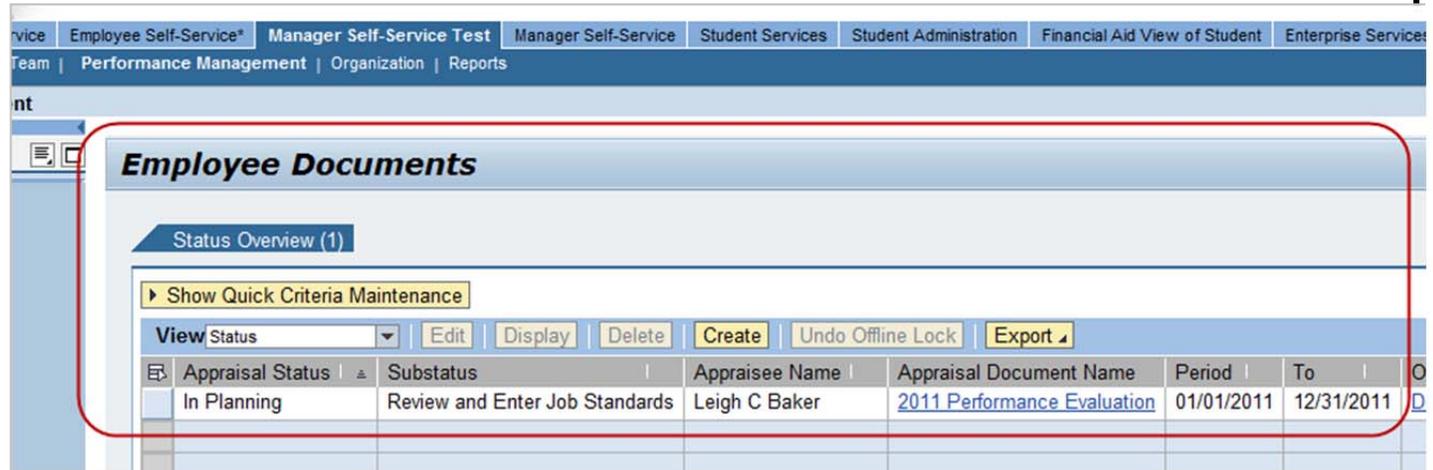


Click **Performance Management**

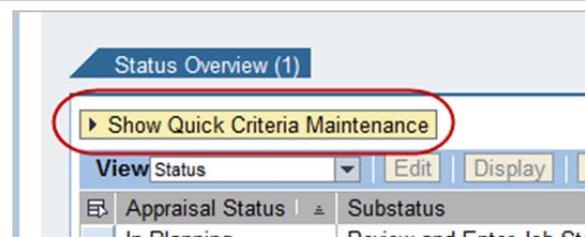


Overview of Employee Documents Window

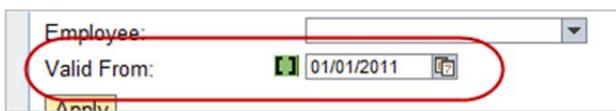
Note: The **Employee Documents** window will display.



Click on **Show Quick Criteria Maintenance**



Valid From



Defaults to the beginning of the current PE year

Note: In the future, this field can be used to search for other PE years. However, PE's completed outside of this system will not be contained in IRIS/SAP.

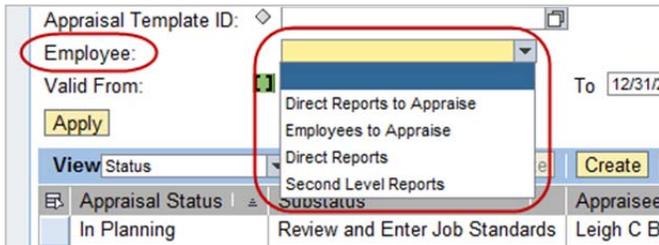
Valid To



Defaults to the end of the current PE year

Note: In the future, this field can be used to search for other PE years. However, PE's completed outside of this system will not be contained in IRIS/SAP.

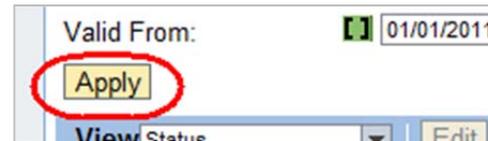
Employee



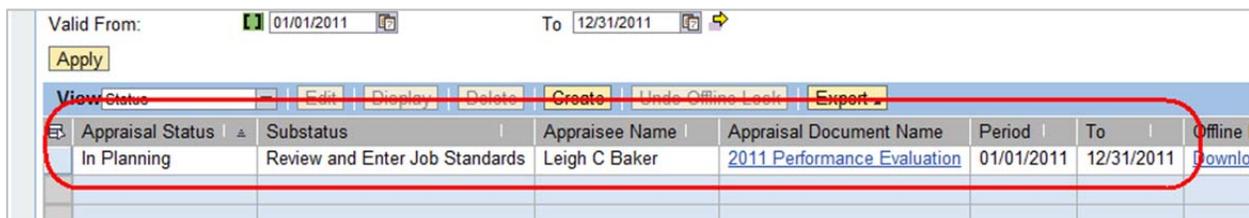
Use this field to make one of the following selections:

- **Direct Reports to Appraise** – displays all employees who directly report to you and who you appraise
- **Employees to Appraise** – displays all employees you appraise whether or not they directly report to you
- **Direct Reports** – displays all employees who directly report to you whether or not you appraise them
- **Second Level Reports** – If you supervisor managers, this choice displays all employees who report to those managers

Click **Apply** to apply the Employee selection you made

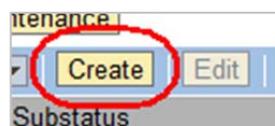


The list of employees and their PEs will display.



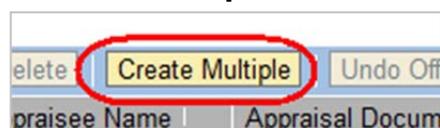
Appraisal Status	Substatus	Appraisee Name	Appraisal Document Name	Period	To	Offline
In Planning	Review and Enter Job Standards	Leigh C Baker	2011 Performance Evaluation	01/01/2011	12/31/2011	Download

Create



Use to create a performance evaluation document for an employee who has been hired AFTER the year's PEs have been loaded into the system

Create Multiple

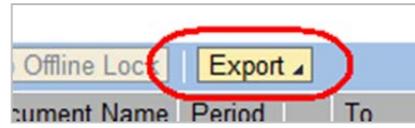


Use to create performance evaluation documents for several employees who has been hired AFTER the year's PEs have been loaded into the system

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Export



Use to export a document to Microsoft Excel

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Viewing an Employee's PE

When the list of employees displays, click on the document listed under **Appraisal Document Name** for the employee you want to select

Appraisee Name	Appraisal Document Name	Period
Leigh C Baker	2011 Performance Evaluation	01/01/2

The employee's performance evaluation will display with information about the process.

The screenshot shows the 'Appraisal Document for Leigh C Baker' interface. At the top, there is a timeline with steps: Manager Sets Expectations, Year-End Review, Acknowledgement, and Complete. Below this, there are tabs for '2011 Performance Evaluation', 'Essential Functions', and 'Year End Comments'. A red box highlights the 'Performance Evaluation Process' section, which contains the following text:

Performance Evaluation Process

- The online form provides an efficient way for managers and employees to document and review performance. This tool is intended to be a part of the ongoing discussion between the manager and employee on performance and job expectations, not to supplant it. Managers and employees may communicate with each other in many different ways. The online performance evaluation form is not intended to be the primary communication between manager and employee.
- The manager will initiate the form at the beginning of the year. The manager and employee will then review and confirm Essential Functions and Job Standards for the year.
- The performance evaluation form will be available to the manager and employee throughout the year. Mid-year reviews, if conducted, may be documented in the form.
- At the end of the year, the manager will initiate the evaluation process. Where appropriate, the second-level manager may review the evaluation.
- The manager and employee will acknowledge review of the form. Acknowledgement will act as the signature of the form. The electronic copy will be the official record of employee performance.

The timeline displayed at the top of the PE will show where in the process the PE is.

This close-up screenshot shows the process timeline for the 'Appraisal Document for Leigh C Baker'. The steps are: Manager Sets Expectations, Year-End Review, Acknowledgement, and Complete. A red oval highlights the 'Manager Sets Expectations' step, indicating the current position in the process.

Displaying Administrative Data

To display the administrative data for this employee, click on **Unhide**

The screenshot shows the 'Administrative Data' section of the appraisal document. A red circle highlights the 'Unhide' button (represented by a square icon with a minus sign) in the top right corner of the section.

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The **Administrative Data** includes: the UK PE Category (including the PE year), Status, Substatus, Appraiser, Appraisee, Validity Period/To (the period for which the employee is being evaluated), and the Execution Period/To (the period for which the PE is planned and completed).

Administrative Data

UK PE Category: 2011 Performance Evaluation Validity Period: 01/01/2011 To: 12/31/2011
 Status: In Planning Execution Period: [] To: []
 Substatus: Review and Enter Job Standards
 Appraiser: Melissa Ann Curry Reedy
 Appraisee: Leigh C Baker [Info](#)

Execution Period/To

Validity Period: 01/01/2011 To: 12/31/2011
 Execution Period: 11/1/2010 To: 2/15/2012

If these fields are blank, you can enter the dates manually or by selecting the date from the calendar icon

Note: Please check with your area for the appropriate dates to use or default to the dates provided by HR.

To view employee master data, click **Info**

Appraiser: Melissa Ann Curry Reedy
 Appraisee: Leigh C Baker [Info](#)

A separate window will display with additional data about the employee.

Additional Data for Appraisee

Field Label	Field Text
Person ID	00052589
Personnel no.	00052589
Position	Ent Appl Group Team Member Level I
Org. Unit	Human Resources Business
Personnel area	Main Campus
Pers. subarea	Reg FT
EE group	Staff
EE subgroup	Exempt Monthly

Close

Click **Close** to close the window

Close

Viewing the Essential Functions and Job Standards

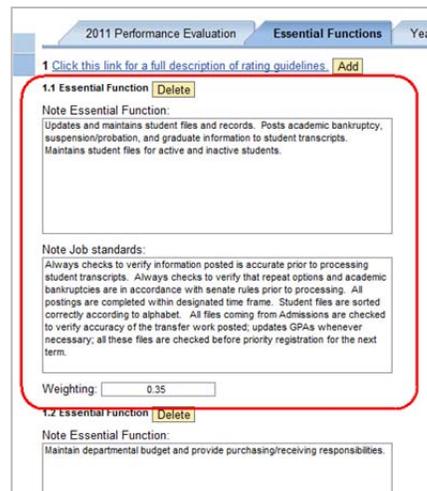
To review the employee's essential functions and job standards, click on the **Essential Functions** tab

Essential Functions

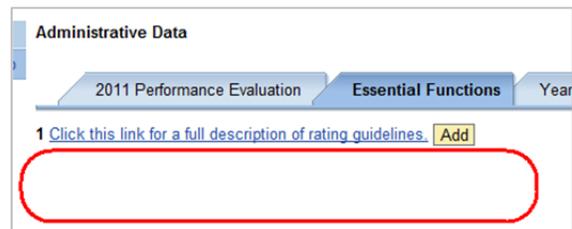
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Note: All of the essential functions and the associated job standards will be listed on this tab along with the weighting for the essential function. Each essential function may be edited by the manager until the manager has marked it as complete. Please refer to the Manager Quick Reference Card **Editing Expectations** for more details.

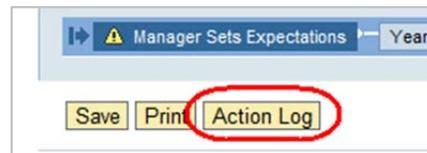


Note: If no essential functions or job standards have been entered, you will need to enter them manually for the employee. Please refer to the Manager Quick Reference Card **Enter Expectations** for more details.

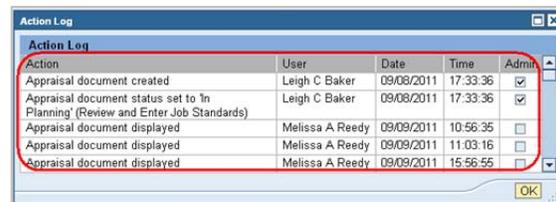


Viewing the Action Log

To view who, when, and why the PE has been accessed, click **Action Log**



Note: The log displays the Action, User, Date, Time, and a checkbox which indicates if the user is an HR administrator.



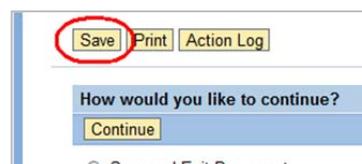
Click **OK** to close the log



Saving the PE

To save the document while you are working, click **Save**

Note: This will save your work and leave the document open.



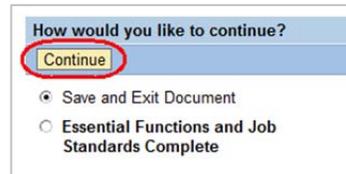
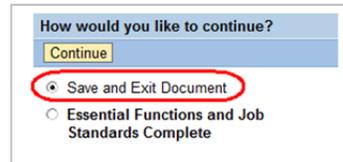
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If you need to close the document and save your work:

Select the **Save and Exit Document** radio button

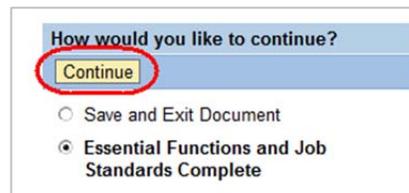
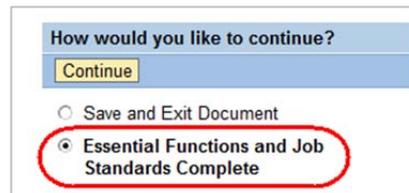
Click **Continue**



If you are ready to submit the document to the employee:

Select **Essential Functions and Job Standards Complete**

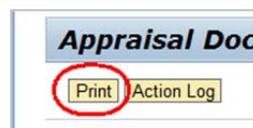
Click **Continue**



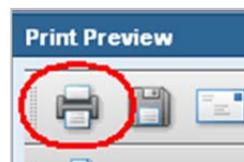
Printing the Document

Note: Preference is to save an electronic copy of the appraisal document on your computer, but if needed, you may print a copy of the pdf document by using the following steps.

Click **Print**

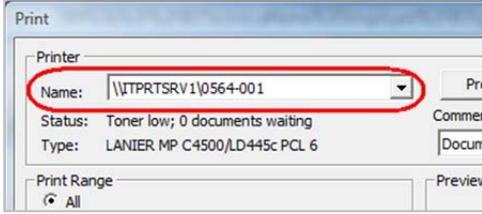
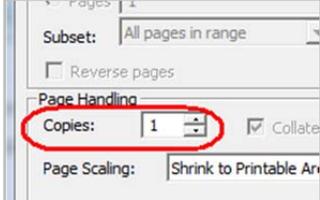
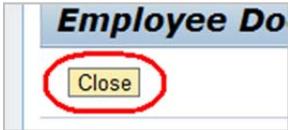


When the print preview opens, click on the printer icon to print the pdf file



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Select your printer, if it is not already displayed	
Select the number of copies	
Click OK	
Closing and Logging Off	
On the Employee Documents window, click Close to close the window	
To log out of <i>myUK</i> , click Log off	