CAREER PATHWAY
PERFORMANCE MANAGEMENT SYSTEM MANAGER GUIDE
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PROCESS AND SYSTEM INFORMATION

Performance Management Process

1) Planning Phase: Staff member and/or Manager enter goals into the system.
2) Tracking Phase: Staff member and/or manager edits goals as necessary throughout the performance cycle; add comments and notes describing achievement of goals, competencies and shared values.
3) Evaluation Phase:
   - System automatically releases self-assessment to staff member, who rates themselves on all goals, competencies and on one shared value.
   - System moves evaluation to manager, who rates the staff member on goals, competencies, one shared value, and overall performance, and confirms completion of compliance programs.
   - Recommended: manager meets with their own manager to review overall ratings for their direct reports.
   - Manager meets with each direct report to discuss review.
   - Manager and direct report electronically sign the evaluation and it is closed out for the year.

Accessing Career Pathway

1) Log in to DrexelOne (http://one.drexel.edu).
2) Select the Staff members tab.
3) Select Career Pathway under the Development & Certifications heading.

Adding a Proxy

1) Select the My Team tab.
2) Hover over the arrow in the bottom right corner of the box containing your name and select Share Permissions from the menu that appears.

3) Select Select Delegates .
4) Search for the user with whom you want to share your permissions.
5) Select next to the user's name.
6) Repeat steps 4-6 for additional users.
7) Select Done when finished adding delegates.
8) To assign all of your permissions to a user(s):
   a. Select the checkboxes for the direct reports and their subordinates, if applicable, for whom the delegate should share permissions.
   b. Select Add Delegates.
9) To assign limited permissions to a user(s):
   a. Select › Define Access by Permission on the right side of the screen.
   b. Select the checkboxes for the access that you want to share with the delegate. c. Select Save .
   d. Select Add Delegates.

Accessing Records for an Individual for Whom You Have Proxy Permission

1) Select the My Team tab.
2) Uncheck the box labeled "Show only my direct reports."
3) This should show the cards for anyone else's records you have permission to see.

GOALS, COMPETENCIES, SHARED VALUES, AND GOAL COMMENTS

Adding Goals for Your Staff member

You and your direct report should agree on the goals that will be entered into the system. Your direct report will be able to see the goals that you have submitted for them.

1) Select the Performance tab.
2) Select Create.
3) Enter goal Title and Description information.
4) Change Start and Due Dates, if necessary: The dates will default to the start and end dates of the performance cycle.
5) Upload any applicable attachments by selecting Choose File below Attachments. You can also add Attachments throughout the year.
6) To assign the goal to one of your direct reports, select the Your Team radio button.
7) Select the direct report to whom you would like to assign the goal
8) Select one of the following options:

   a. Save as Draft : Select if you are not yet ready to save the goal. b. Cancel : Select if you do not wish to save the goal.

   c. Submit : Select if you are finished drafting your goal and you want to save it. You must Submit the goal for your direct report to see it.
9) Once you select Submit, the goal will be displayed with an In Progress status on the Team Goals page under the Performance tab. Select the › button next to a direct reports' name to show all goals assigned to that direct report.

Editing Goals

As priorities and schedules change throughout the year, you have the ability to edit your goals as necessary.

1) Hover over the Performance tab and select Goals.
2) Select the Team Goals tab.
3) Click on the › next to the appropriate direct report's name.
4) Click on the ▾ next to the appropriate goal, and select Edit.
5) Make the changes to the goal Title, Description, Start and Due Dates, Comments, or Attachments.
6) Select Submit.

Deleting Goals

Goals can be deleted throughout the year as you and your direct report see fit.

1) Hover over the Performance tab and select Goals.
2) Select the Team Goals tab.
3) Click on the next to the appropriate direct report's name.
4) Click on the next to the appropriate goal, and select Cancel.

Changing Goal Progress for Your Direct Report's Goals

As your direct reports complete their goals throughout the year, you can update the Progress percentage that is displayed on the Team Goals page. *Updating the Goal Progress is not mandatory; it is an optional tool*.

1) Hover over the Performance tab and select Goals.
2) Select the Team Goals tab.
3) Click on the next to the appropriate direct report's name.
4) Click on the progress bar to show how much progress your direct report has made on the goal.

Viewing Competencies

Drexel's core competencies are defined on the Competencies page under the Performance tab. Use the definitions and ratings descriptions as a guide for rating the demonstration of competencies.

There is no further action required on the Competencies page until the end of the performance cycle. Once your direct report's self-review is released by the system, your direct report will have access to rate their demonstration of each Competency, and then you will rate as well.

Viewing Shared Values

The Shared Values are outlined on the University website. Use the How do the Shared Values relate to my job/role? and Shared Values Behavior Examples documents to better understand how you can apply the Shared Values to your position.

There is no further action required on the Shared Values page until the end of the performance cycle. Once your direct report's self-review is released by the system, your direct report will have access to rate their demonstration of one of the shared values, and then you will rate as well.

Adding, Editing, and Deleting Comments

Career Pathway allows you and your direct report to write comments for a particular goal throughout the year.

You can use the Comments section to update the progress on a goal or track milestones. *Adding comments is not mandatory; it is an optional tool.*

1) Hover over the Performance tab and select Goals.
2) Select the Team Goals tab.
3) Click on the › next to the appropriate direct report's name.
4) Click on the ▾ next to the appropriate goal, and select Edit.
5) Select Add Comment under the Comments heading.
6) Enter your comment text and select **Add**.
7) Select **Submit**.
8) To edit your comment, select ▾ next to the comment and choose Edit. Edit the comment and then choose **Save**.
9) To delete your comment, select ▾ next to the comment and choose Delete. Be aware that once you delete your comment you cannot retrieve it.

MANAGER REVIEW

Adding a Co-Planner

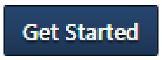
If your staff member has a secondary manager, you can add them as a co-planner. Please be aware that there will not be two different manager ratings, rather, you will share a rating with the co-planner. The name of whoever saves a rating/comment last before the performance review is submitted will be displayed as the manager next to the ratings and comments. In general, this should be the current manager/manager listed in Career Pathway.

1) Select Add Co-Planner in the Options drop-down box in the upper-right corner of the page.
2) Search for the co-planner and then select next to their name.
3) Select Done.
4) You can remove the co-planner at any time by selecting next to their name in the Add Co-Planner box.

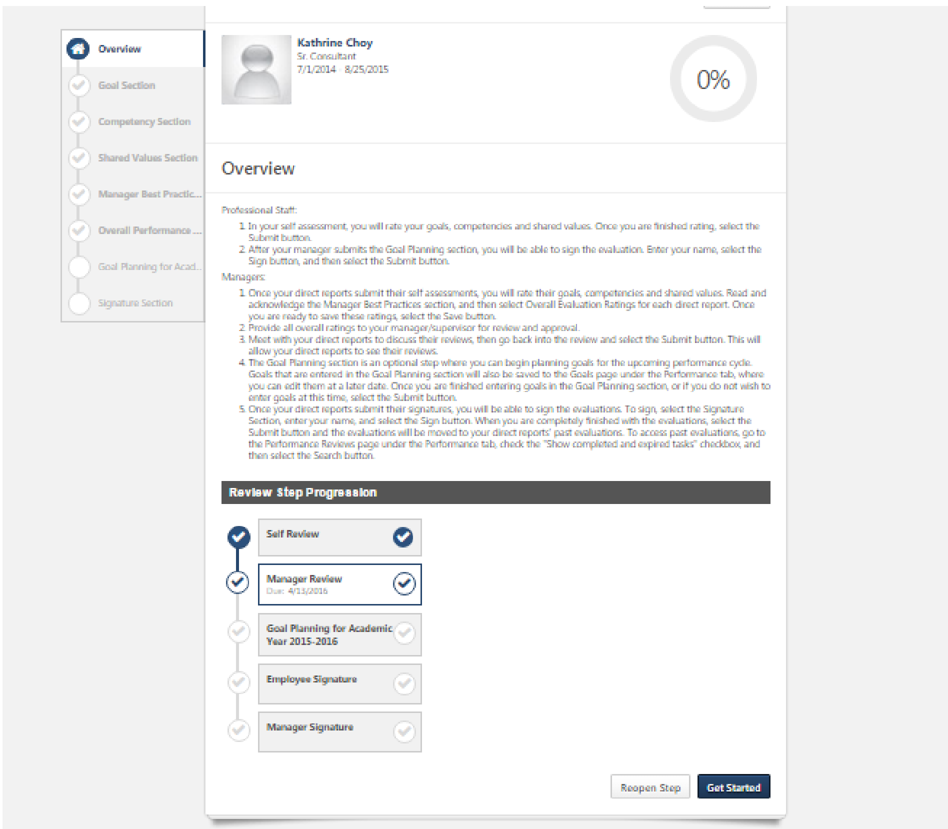
Completing Your Manager Review

The system will automatically release your staff member's evaluation at the end of the performance cycle. It will include the goals that you and/or your staff member have entered into the system and the Drexel competencies (shown on the Competencies page under the Performance tab and described on page 4) and Shared Values (Shown on the Shared Values page under the Performance tab). Once your staff member submits their self review, you will have access to rate their goals, competencies, one shared value, and provide an overall rating.

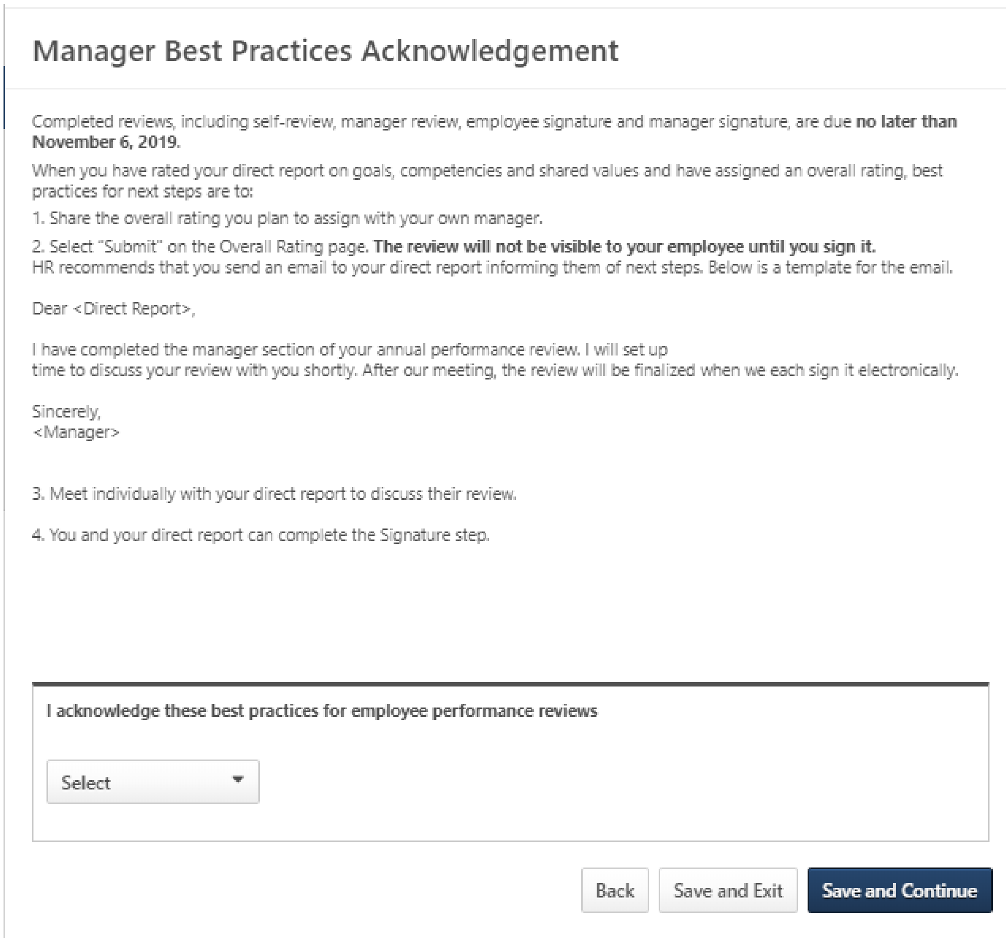
1) Hover over the Performance tab and select Performance Reviews from the drop down menu.
2) Select 

under the My Assigned Reviews tab. (Your icon will include the name of your staff member.)
3) Select 

at the bottom of the page.



4) The Manager Best Practices page describes specific steps to complete before submitting the review. Read and follow the steps, and select Yes from the Acknowledgement drop-down box.


Manager Best Practices Acknowledgement

Completed reviews, including self-review, manager review, employee signature and manager signature, are due **no later than November 6, 2019.**

When you have rated your direct report on goals, competencies and shared values and have assigned an overall rating, best practices for next steps are to:

1. Share the overall rating you plan to assign with your own manager.

2. Select "Submit" on the Overall Rating page. **The review will not be visible to your employee until you sign it.**
HR recommends that you send an email to your direct report informing them of next steps. Below is a template for the email.

Dear <Direct Report>,

I have completed the manager section of your annual performance review. I will set up time to discuss your review with you shortly. After our meeting, the review will be finalized when we each sign it electronically.

Sincerely,
<Manager>

3. Meet individually with your direct report to discuss their review.

4. You and your direct report can complete the Signature step.

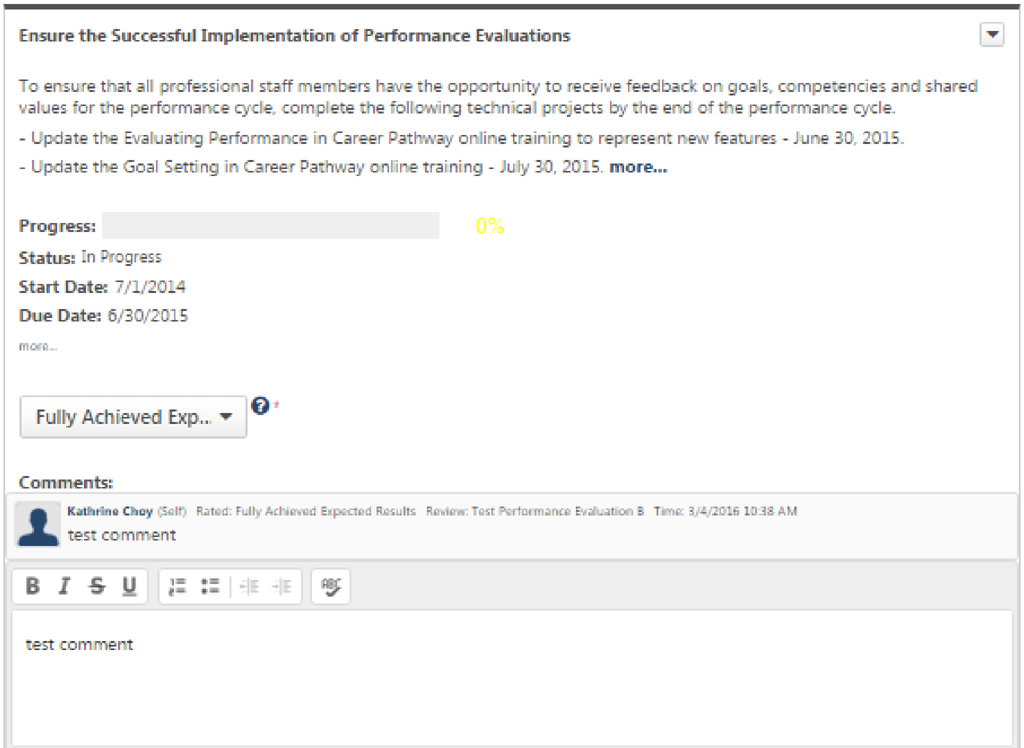
I acknowledge these best practices for employee performance reviews

Select

Back | Save and Exit | **Save and Continue**

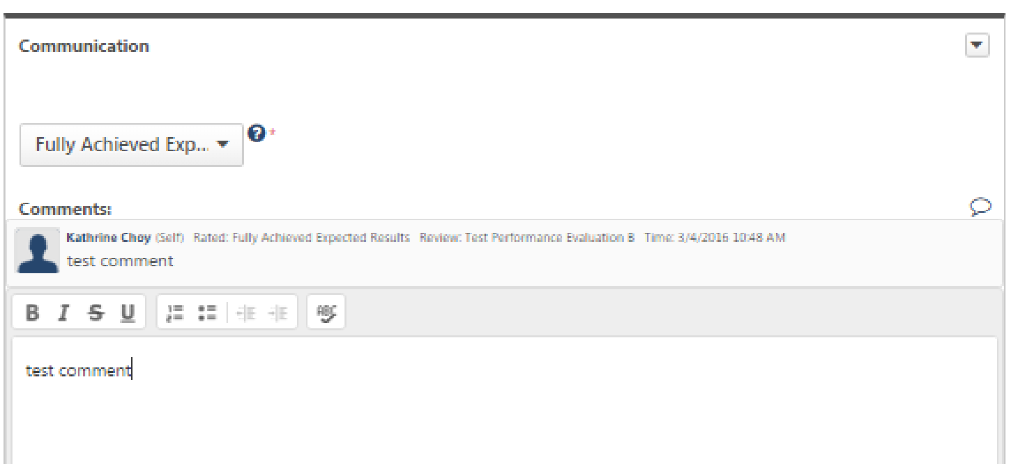
5) Select  to move on to the Goals page.

6) For each of your staff member's goals, select a rating from the drop down menu and enter any comments in the Comments field. Your staff member's self review rating and comments will display underneath the Comments field.
7) You can display any comments you or your staff member entered into the goals page by clicking on the down-arrow in the top-right corner of each goal box.



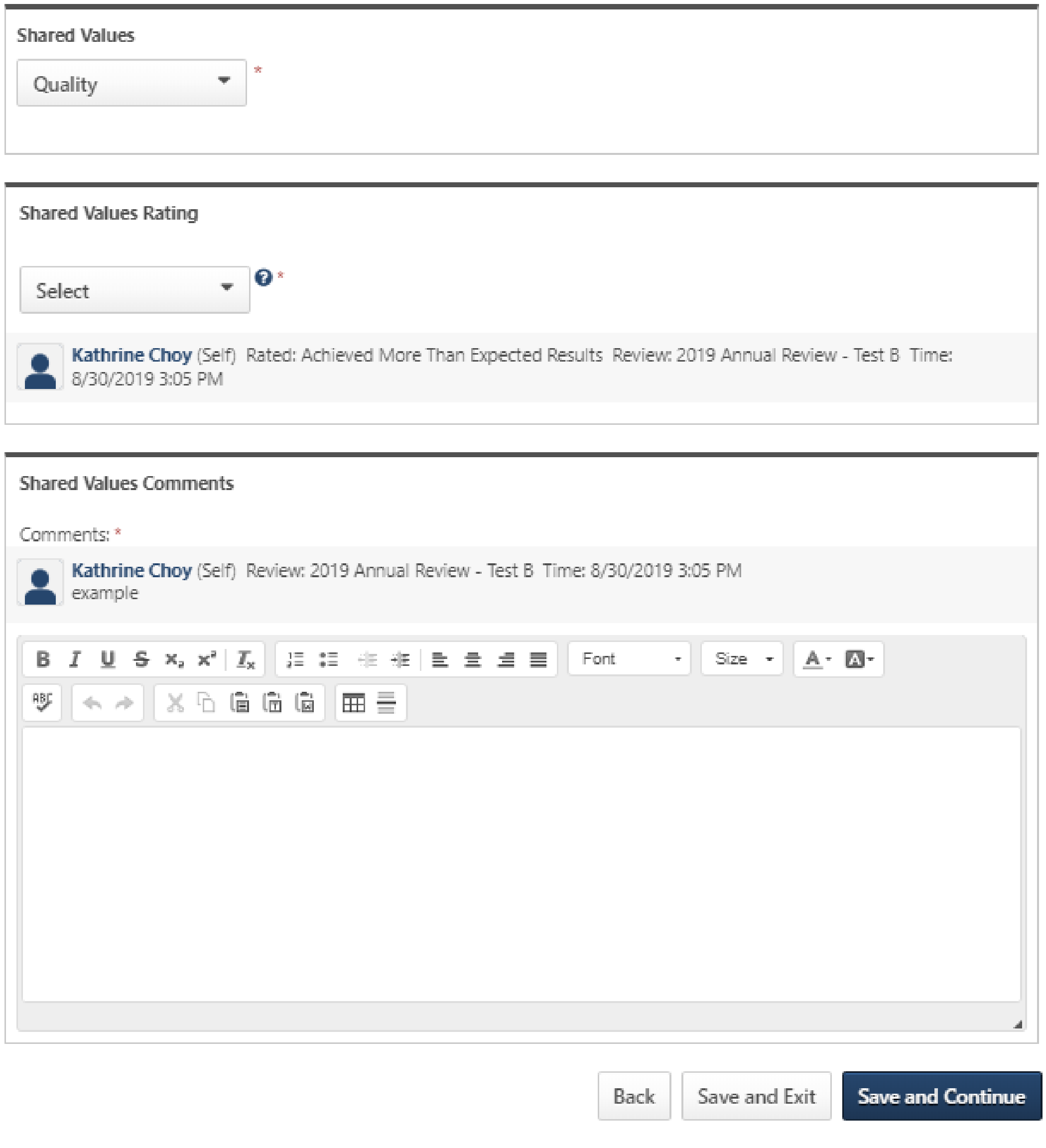
8) Select  to move on to the Competencies page.

9) For each of the competencies, select a rating from the drop down menu and enter any comments in the Comments field.
10) You can access ample behavioral descriptions for each rating by clicking on the speech bubble in each competency box.

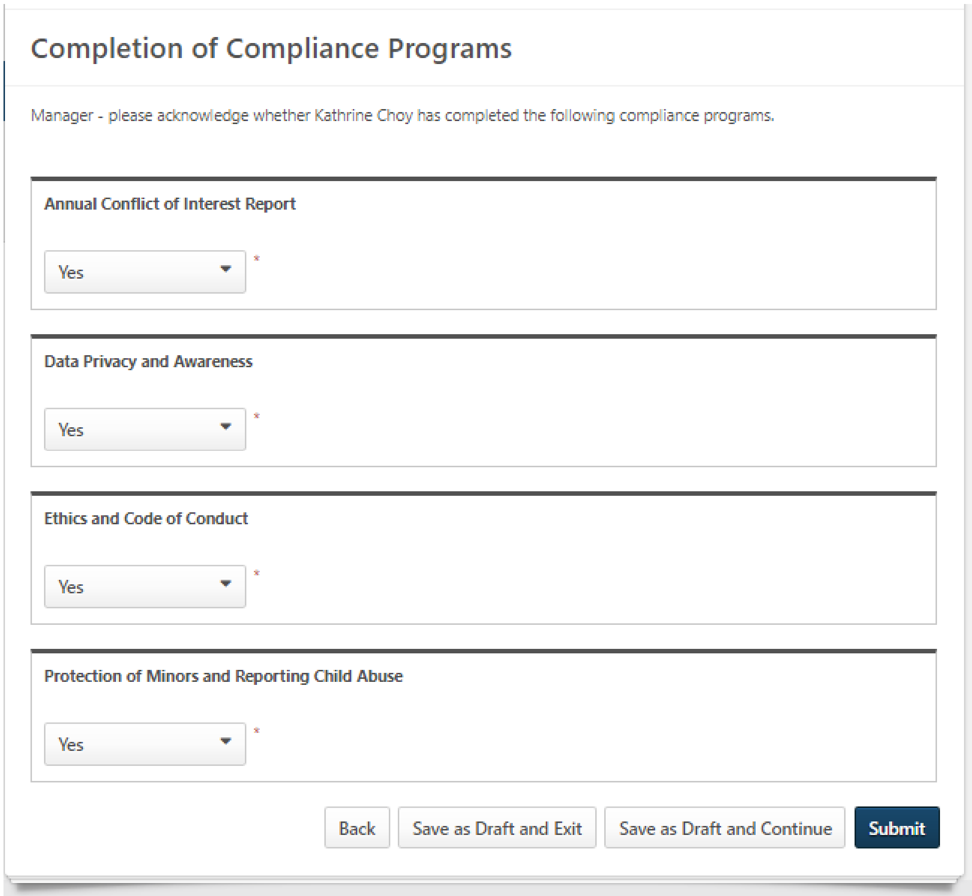


11) Select 

to move on to the Shared Values page.
12) Select a rating for the demonstration of the Shared Value your direct report described, along with a description of how they were demonstrated in the Comments field.

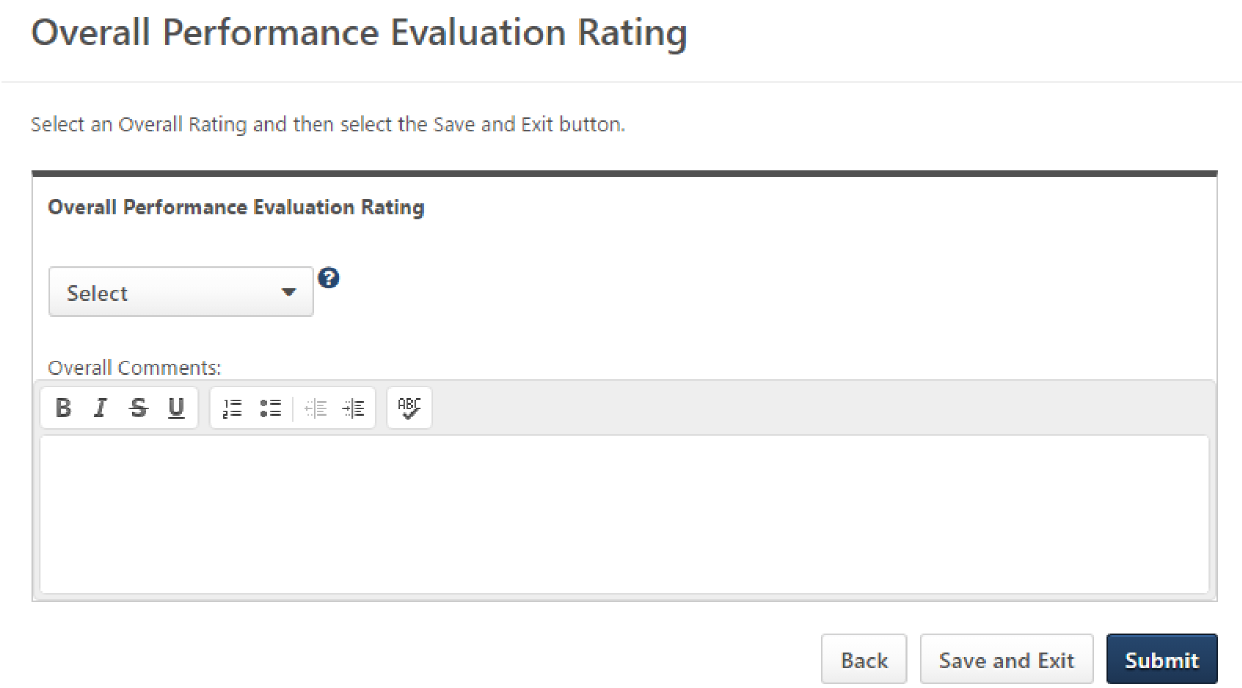


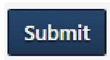
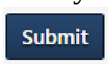
13) Select Save and Continue to move on to the Completion of Compliance Programs page.



14) Check to ensure your direct report has completed all compliance programs, and select "yes" from the drop-down menu for each when confirmed. You will have access to reports that show completion of compliance.

15) Select Save and Continue to move on to the Overall Performance Evaluation Rating page.



16) On the Overall Performance Evaluation page, select an overall rating for your direct report and select  .
17) It is recommended that you review your team's overall ratings with your supervisor.
18) The system will verify that you are ready to submit your manager review. Select  to submit.
19) Meet with your direct report to discuss the review; then you and your direct report will sign the review. See the instructions for signing the review on page 18.

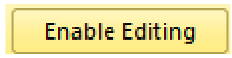
Completing Your Manager Review Offline

Your manager review can also be completed entirely offline using Microsoft Excel.

1) Select Complete Review Offline from the Options drop-down box in the upper-right corner of the page.
2) When the Excel dialog box appears, select 

and navigate to where you would like to save the review. If you like, you can change the name that the file will be saved as.
3) Select 

.
4) In the Excel Document

   a. Select 

in the ribbon at the top of the screen, if necessary.

   b. Overview Tab: This tab contains instructional information such as the rating scale description and information about the offline performance review form.

   c. Manager Best Practices Acknowledgement Tab: This tab asks you to acknowledge the best practices for a manager. Click on the down-arrow in cell B17 and select Yes.

   d. Goal Section Tab: The rating scale will display at the top of this tab. Your staff member's goals will be listed starting on row 24.
      i. Select the rating for each goal in column F.
      ii. Enter comments for each goal in column G. Entering comments is optional.
      iii. Save the document.

   e. Competency Section Tab: The rating scale will display at the top of this tab. The competencies will be listed starting on row 25.
      i. Select the rating for each competency in column C.
      ii. Enter comments for each competency in column D. Entering comments is optional.
      iii. Save the document.

   f. Shared Values Section Tab: The rating scale will display at the top of this tab.
      i. Select the rating for the shared value listed in column B.
      ii. Enter comments for each goal in column C. Entering comments is optional.
      iii. Save the document.

   g. Completion of Compliance Programs Tab: This tab is to ensure the manager is tracking their team's compliance.
      i. Check that your direct report completed each compliance program and select Yes from the drop-down menus in column B.
      iii. Save the document.

   h. Overall RatingTab: The rating scale will display at the top of this tab.
      i. Select an overall rating for the review from the drop-down menu in column B.
      ii. Enter comments for each goal in column C. Entering comments is optional.
      iii. Save the document.

5) In Career Pathway

a. Select Upload Performance Review from the Options drop-down box in the upper right-hand corner of the page.
b. Select Choose File , navigate to where you saved the performance review file, and select Open .
c. Select Import .The ratings and comments that you entered for your goals, competencies and shared values will now display in the online performance review.
d. Select Get Started and review the ratings and comments for your direct report's review including manager best practices, goals, competencies, shared values, completion of compliance, and overall rating.
e. Select Submit
f. The system will verify that you are ready to submit your manager review. Select Submit to submit.
g. It is recommended that you review your team's overall ratings with your supervisor.
h. Meet with your direct report to discuss the review; then, you and your direct report will sign the review.

Adding Development Training and Action Steps

If your staff member needs improvement in a particular area, you can add this to their performance review as a development training or development action step.

Development Training

Adding a development training will create a prompt for your staff member to register for an in-class or online course offered by Drexel Human Resources, such as Microsoft Office training or Communicating Clearly.

1) Select Add Development Training.
2) Search for the in-class or online course.
3) Select next to the course name that you want to add. The course will appear in the Actions box.
4) Adjust the due date if necessary.
5) You can delete the development training at any time by selecting .

Development Action Step

Adding a development action step will create a prompt for your staff member to seek an external training opportunity that is not currently offered by Drexel Human Resources, such as achieving a professional certificate.

1) Select Add Development Action Step.
2) Enter the action step in the text field.
3) Select Outside Training from the Category drop down menu.
4) Select Save. The course will appear in the Actions box.
5) Adjust the due date if necessary.
6) You can delete the development training at any time by selecting .

Reopening Your Staff member's Self Review

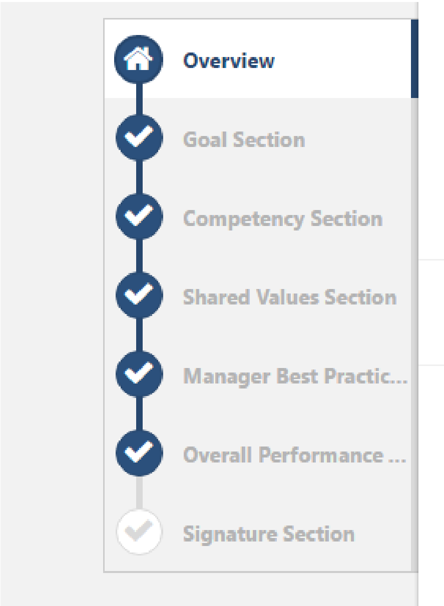
You can reopen your staff member's self review if he/she wants to make adjustments to ratings or comments. If
you need to revise your ratings/comments after you submit your manager review, please email hrlearn@drexel.edu and someone from the Learning & Development team can reopen the review for you.

1) Select Performance Reviews under the Performance tab.
2) Select the evaluation title to view the evaluation.
3) Select Reopen Step on the Overview section page.
4) Select the step to reopen.
5) Select Save. Your staff member now will be able to change his/her ratings/comments.

SIGNING AND PRINTING YOUR STAFF MEMBER'S EVALUATION

Signing Your Staff Member's Evaluation

1) Hover over the Performance tab and select Performance Reviews from the drop down menu.
2) Select Complete Manager Review of under the My Assigned Reviews tab. (Your icon will include the name of your staff member.)
3) Select the Signature Section on the left navigation bar.



4) Type your name in the Manager text box.
5) Select Sign.
6) Once the page refreshes, your signature will be saved with a time stamp.
7) Once you are absolutely sure that your staff member's evaluation is complete and no changes will need to be made to it, select Submit. **You will not be able to make any changes to the evaluation once it has been submitted.**
8) Once the evaluation is submitted, you will be able to access it in your staff member's past evaluations.

Printing Your Staff member's Performance Review

1) Select Print Review from the Options drop-down box in the upper-right corner of the page.
2) Select either Print Review (manager version) or Print Reviewee Version. If the manager review has been submitted, both options will display the same information. If the manager review is not submitted, the Reviewee Version will not display the manager's ratings and/or comments.
3) When the File Download dialog box appears, select Save and navigate to where you would like to save your review. If you like, you can change the name that the file will be saved as.
4) Select Save.
5) To view, select Open.