# CAREER PATHWAY

## PERFORMANCE MANAGEMENT SYSTEM MANAGER GUIDE

## TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process and System Information</td>
<td>2</td>
</tr>
<tr>
<td>Performance Management Process</td>
<td>2</td>
</tr>
<tr>
<td>Accessing Career Pathway</td>
<td>2</td>
</tr>
<tr>
<td>Adding a Proxy</td>
<td>3</td>
</tr>
<tr>
<td>Goals, Competencies, Shared Values, and Goal Comments</td>
<td>4</td>
</tr>
<tr>
<td>Adding Goals for Your Employee</td>
<td>4</td>
</tr>
<tr>
<td>Editing Your Direct Report’s Goals</td>
<td>4</td>
</tr>
<tr>
<td>Deleting Your Employee’s Goals</td>
<td>5</td>
</tr>
<tr>
<td>Changing Goal Progress for Your Direct Report’s Goals</td>
<td>5</td>
</tr>
<tr>
<td>Viewing Competencies</td>
<td>5</td>
</tr>
<tr>
<td>Viewing Shared Values</td>
<td>5</td>
</tr>
<tr>
<td>Adding, Editing, and Deleting Comments</td>
<td>6</td>
</tr>
<tr>
<td>Manager Review: Rating Your Employee’s Goals and Competencies</td>
<td>7</td>
</tr>
<tr>
<td>Adding a Co-Planner</td>
<td>7</td>
</tr>
<tr>
<td>Completing Your Manager Review</td>
<td>8</td>
</tr>
<tr>
<td>Completing Your Manager Review Offline</td>
<td>13</td>
</tr>
<tr>
<td>Adding Development Training and Action Steps</td>
<td>15</td>
</tr>
<tr>
<td>Developing Training</td>
<td>15</td>
</tr>
<tr>
<td>Development Action Step</td>
<td>15</td>
</tr>
<tr>
<td>Reopening Your Employee’s Self Review</td>
<td>16</td>
</tr>
<tr>
<td>Signing and Printing Your Employee’s Evaluation</td>
<td>16</td>
</tr>
<tr>
<td>Signing Your Employee’s Evaluation</td>
<td>16</td>
</tr>
<tr>
<td>Printing Your Employee’s Performance Review</td>
<td>16</td>
</tr>
</tbody>
</table>
PROCESS AND SYSTEM INFORMATION

Performance Management Process

1) Planning Phase: Employee and/or Manager enter goals into the system.
2) Tracking Phase: Employee 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 employee, who rates themselves on all goals, competencies and on one shared value.
   - System moves evaluation to manager, who rates the employee 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 Employees tab.
3) Select Career Pathway under the Development & Certifications heading.

Questions? Email hrperform@drexel.edu.
**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**.
GOALS, COMPETENCIES, SHARED VALUES, AND GOAL COMMENTS

Adding Goals for Your Employee
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 .
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 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. : Select if you are not yet ready to save the goal.
   b. : Select if you do not wish to save the goal.
   c. : 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, or Attachments.
6) Select .
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 in the [2012-2017 Strategic Plan](#). 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 or two of the shared values, and then you will rate as well.

Questions? Email hrperform@drexel.edu.
**Adding, Editing, and Deleting Comments**

Career Pathway allows you and your employee 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 under the Comments heading.
6) Enter your comment text and select .
7) Select .
8) To edit your comment, select next to the comment and choose Edit. Edit the comment and then choose .
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.

Questions? Email hrperform@drexel.edu.
Adding a Co-Planner

If your employee 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.

1) Select 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 .
4) You can remove the co-planner at any time by selecting next to their name in the Add Co-Planner box.
Compli...ng Your Manager Review
The system will automatically release your employee’s evaluation at the end of the performance cycle. It will include the goals that you and/or your employee 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 employee 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 Complete Manager Review of under the My Assigned Reviews tab. (Your icon will include the name of your employee.)
3) Select Get Started at the bottom of the page.

Questions? Email hrperform@drexel.edu.
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.

5) Select to move on to the Goals page.
6) For each of your employee’s goals, select a rating from the drop down menu and enter any comments in the Comments field. Your employee’s self review rating and comments will display underneath the Comments field.

7) Select **Save and Continue** to move on to the Competencies page.
8) For each of the competencies, select a rating from the drop down menu and enter any comments in the Comments field.

9) Select **Save and Continue** to move on to the Shared Values page.

Questions? Email hrperform@drexel.edu
10) 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.

11) Select **Save and Continue** to move on to the Completion of Compliance Programs page.
12) 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.

13) Select to move on to the Overall Performance Evaluation Rating page.

Overall Performance Evaluation Rating

Select an Overall Rating and then select the Save and Exit button.

14) On the Overall Performance Evaluation page, select an overall rating for your direct report and select .

15) It is recommended that you review your team’s overall ratings with your supervisor.

16) Access the review again and select the Overall Performance Evaluation Rating section from the left navigation bar.

17) Check the overall rating and comments and select .

18) The system will verify that you are ready to submit your manager review. Select to submit.

Questions? Email hrperform@drexel.edu
**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. Goal Section Tab: The rating scale will display at the top of this tab. Your employee’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.

   d. 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 and close the document.

   e. Shared Values Section Tab: The rating scale will display at the top of this tab.

      i. Select the rating for one or two shared values in column C.

      ii. Enter comments for each goal in column D. Entering comments is optional.

      iii. Save and close 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 , navigate to where you saved the performance review file, and select .

c. Select . The ratings and comments that you entered for your goals, competencies and shared values will now display in the online performance review.

d. Select , and review the ratings and comments for your direct report’s goals, competencies and shared values.

e. On the Overall Performance Evaluation page, select an overall rating for your direct report and select .

f. It is recommended that you review your team’s overall ratings with your supervisor.

h. Access the review again and select the Overall Performance Evaluation Rating section from the left navigation bar.

i. Check the overall rating and comments and select .

j. The system will verify that you are ready to submit your manager review. Select to submit.
Adding Development Training and Action Steps

If your employee 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 employee 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 employee 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 . 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 Employee’s Self Review
You can reopen your employee’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 on the Overview section page.
4) Select the step to reopen.
5) Select . Your employee now will be able to change his/her ratings/comments.

Questions? Email hrperform@drexel.edu.
SIGNING AND PRINTING YOUR EMPLOYEE’S EVALUATION

Signing Your Employee’s Evaluation
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 employee.)
3) Select the Signature Section on the left navigation bar.

4) Type your name in the Manager text box.
5) Select .
6) Once the page refreshes, your signature will be saved with a time stamp.
7) Once you are absolutely sure that your employee’s evaluation is complete and no changes will need to be made to it, select. 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 employee’s past evaluations.

Printing Your Employee’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 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 .
5) To view, select .

Questions? Email hrperform@drexel.edu.