CAREER PATHWAY PERFORMANCE MANAGEMENT SYSTEM EMPLOYEE USER GUIDE

TABLE OF CONTENTS

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; confirms completion of compliance.
- 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.
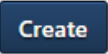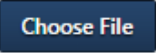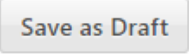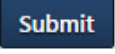
Accessing Career Pathway

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.
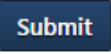
GOALS, COMPETENCIES, AND GOAL COMMENTS

Creating Goals

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

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 annual performance cycle.
5) Upload any applicable attachments by selecting **Choose File** below Attachments. You can also add Attachments throughout the year.
6) Select one of the following options:

   a. **Save as Draft** : Select if you are not yet ready to submit 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 your goals for your supervisor to see them, and for your goals to be automatically imported into your review.

7) Once you select Submit, your goal will be displayed with an In Progress status on the Goals page under the Performance tab.

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) Click on the ▼ next to the appropriate goal and select Edit.
3) Make the changes to the goal Title, Description, Start and Due Dates, or Attachments.
4) Select **Submit** .

Deleting Goals

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

1) Hover over the Performance tab and select Goals.
2) Click on the ▼ next to the appropriate goal and select Cancel.

Questions? Email hrperform@drexel.edu.

Changing Goal Progress

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

1) Hover over the Performance tab and select Goals.
2) Click on the progress bar to show how much progress you have 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 self-review is released by the system, you will have access to rate your demonstration of each Competency.

Viewing Shared Values

The Shared Values are outlined in the 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 self-review is released by the system, you will have access to rate your demonstration of one of the Shared Values.

Adding, Editing, and Deleting Comments

Career Pathway allows you and your manager 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 goal title under the My Goals heading.
3) Select Add Comment under the Comments heading.
4) Enter your comment text and select Add .
5) To edit your comment, select ▼ next to the comment and choose Edit. Edit the comment and then choose Save
6) To delete your comment, select ▼ next to the comment and choose Delete. Be aware that once you delete your comment you cannot retrieve it.
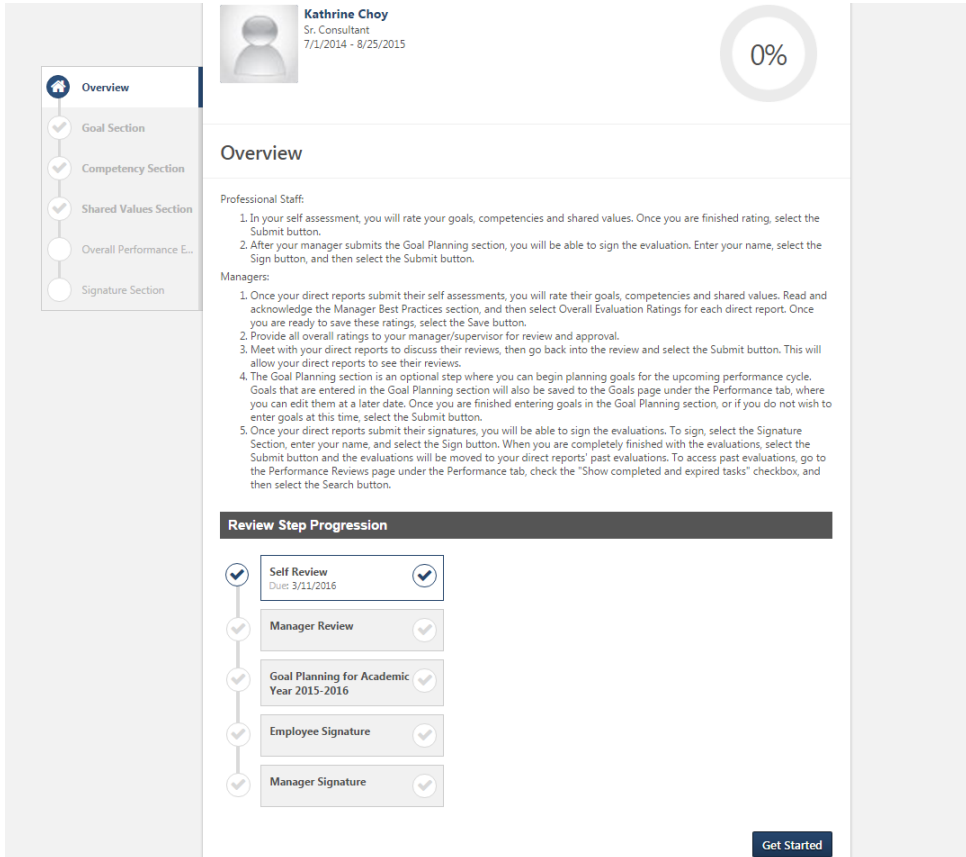
Questions? Email hrperform@drexel.edu.

Completing Your Self Review

The system will automatically release your self-review at the end of the performance cycle. It will include the goals that you 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 and described on page 4).

1) Scroll down to the Your Tasks box on the Welcome page.

2) Select **Complete Self Review**.

3) Select **Get Started** at the bottom of the page.

4) For each of your goals, select a rating from the drop down menu and enter any comments in the field below. Entering comments is optional, but we suggest entering a summary of your accomplishments so that your manager can make an informed decision when they are selecting a rating for your goal.

Ensure the Successful Implementation of Performance Evaluations

To ensure that all professional staff members have the opportunity to receive feedback on goals, competencies and shared values for the performance cycle, complete the following technical projects by the end of the performance cycle.
- Update the Evaluating Performance in Career Pathway online training to represent new features - June 30, 2015.
- Update the Goal Setting in Career Pathway online training - July 30, 2015. **more...**

Progress: 0%
Status: In Progress
Start Date: 7/1/2014
Due Date: 6/30/2015
more...

Select

Comments:

5) Select **Save and Continue** .

6) For each of the competencies, select a rating from the drop down menu and enter any comments in the field below. Entering comments is optional, but we suggest entering a summary of your accomplishments so that your manager can make an informed decision when he/she is selecting a rating for that competency.

Competency Section

In the Competencies Section, please rate and provide comments for each competency.

Selecting the icon next to the Competency name will display suggested comments for each of the competencies depending on the employee's performance. Using this comment text is not mandatory, rather, it can serve as a starting point to begin writing about the employee's performance.

Self Review Instructions
If you have finished rating goals, competencies and shared values and are ready to submit the review to your manager, select the Submit button at the bottom of the page.

Communication

Select

Comments:

Questions? Email hrperform@drexel.edu.

7) Select **Save and Continue** .

8) On the Shared Values page choose one of the Shared Values from the drop-down menu to rate and describe. Select a rating and enter examples that describe how you demonstrated the Shared Value. All three fields on this page are required.

Shared Values

Select ▼ *

Shared Values Rating
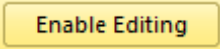
Select ▼ ❓ *

Shared Values Comments

Comments: *

B I U S x₂ x² Iₓ | ≒ ≔ | ⇥ ⇤ | ≣ ≣ ≣ ≣ | Font ▼ | Size ▼ | A ▼ A ▼

ABC | ↩ ↪ | X □ □ □ □ | ⊞ ≣

[Back] [Save and Exit]

9) When you have finished entering ratings and comments for your goals, competencies and shared values, select **Submit** .

10) The system will verify that you are ready to submit your self-review. Select **Submit** .

Questions? Email hrperform@drexel.edu.

Completing Your Self Review Offline

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

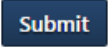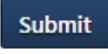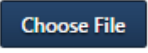1) Select Complete Review Offline in the Options drop-down box in the upper-right corner of the page.
2) When the Excel dialog box appears, open the file and save the review.
3) In the Excel Document
   a. Select [Enable Editing] in the ribbon at the top of the screen, if necessary.
   b. Overview Tab: 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 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, but we suggest entering a summary of your accomplishments so that your manager can make an informed decision when he/she is selecting a rating for your goal.
      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 goal in column D. Entering comments is optional, but we suggest entering a summary of your accomplishments so that your manager can make an informed decision when he/she is selecting a rating for your goal.
      iii. Save and close the document.
   e. Shared Values Section Tab: The rating scale will display at the top of this tab. The competencies will be listed starting on row 25.
      i. Select one shared value to rate and comment on from the drop-down menu
      ii. Select the rating for one shared value in column B.
      iii. Enter comments describing the demonstration of shared values in column C. Entering comments is optional, but we suggest entering a summary of your accomplishments so that your manager can make an informed decision when he/she is selecting a rating for your goal.
      iv. Save and close the document.

4) In Career Pathway
   a. Select Upload Performance Review from the Options drop-down box in the upper-right corner of the page.
   b. Select [Choose File], navigate to where you saved the performance review file, and select [Import].
   c. The system will confirm the sections of the file for upload. Select [Save].
   d. The ratings and comments that you entered for your goals, competencies and shared values will now display in the online performance review.
   e. Select the Get Started button at the bottom of the page. The Goals section will display with your ratings and comments. Select [Save and Continue] at the bottom of the page.

Questions? Email hrperform@drexel.edu.

f. The Competencies section will display with your ratings and comments. Select **Save and Continue** at the bottom of the page.

g. The Shared Values section will display. Double check your ratings and then select **Submit** .

h. The system will verify that you are ready to submit your self-review. Select **Submit** .
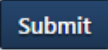
Adding Attachments to Your Self Review

You have the ability to add up to three attachments to your self-review. If you would like to add more than three attachments, you can do so through the Goals page under the Performance tab. See Creating Goals, Step 5 on page 3 for instructions.

1) Select Attachments in the Options drop-down box in the upper-right corner of the page.

2) Select **Choose File** , navigate to where you saved the file you wish to attach and select it.

3) Select **Save** . The file will be displayed under Attachments in the Options drop-down menu.

   a. To delete the attachment, select ✕ above the file name in the Attachments box.

9

Questions? Email hrperform@drexel.edu.

SIGNING AND PRINTING YOUR EVALUATION

Signing Your Performance Review

1) Hover over the Performance tab and select Performance Reviews.

2) Select **Complete Self Review** under the My Assigned Reviews tab.

3) Look through the review by selecting **Get Started** at the bottom of the page, then selecting **Save and Continue** at the bottom of the Goals, Competencies, Shared Values, and Overall Performance Evaluation Rating pages.

4) Type your name in the Self box.

5) Select **Sign**. Once the page refreshes, your signature will be saved with a time stamp.

6) Select **Submit**.

7) Once you and your manager both electronically sign the review, the review will be closed out and you will be able to access it in your past evaluations.
   a. Select Performance Reviews under the Performance tab.
   b. Select the checkbox next to "Show completed and expired tasks".
   c. Select the title of the performance review to view the full document.

Printing Your Self Review

1) Select Print Review from the Options drop-down box in the upper-right corner of the page.