



After you conduct the Performance Evaluation Discussion, you will need to document the date and results of the discussion. Then, you will then sign the form and forward it to your employee to sign.

1

NAVIGATE TO THE CORRECT PERFORMANCE MANAGEMENT FORM

On the Dashboard, there will be a "For You Today" section, or you can access the form from the Home drop-down menu. Click "Performance" to access your Inbox.

2

NAVIGATE TO EVALUATION DISCUSSION

Scroll down or click on "Evaluation Discussion" to navigate to that section.

Evaluation Discussion

- * Date of Evaluation Discussion: MM/DD/YYYY
- * Results of Evaluation Discussion: Select one...
- * Supervisor's Signature: [Text Field]

3

DOCUMENT DATE

Select the date the Evaluation Discussion was conducted.

Evaluation Discussion

- * Date of Evaluation Discussion: MM/DD/YYYY
- * Results of Evaluation Discussion
- * Supervisor's Signature

Summary Section

Overall Form Rating: 4.0 - Exceeds Expectations

Calendar overlay for February 2024. The date 21 is selected.



Document the Evaluation Discussion on the SAME day you conduct it. The system will indicate what date you select the planning discussion date. Backdating or advance dating may result in an audit finding.





4

DOCUMENT RESULTS

Select the "Results of the Evaluation Discussion" using the drop-down menu.

Summary Section

- * Date of Evaluation Discussion: 02/21/2024
- * Results of Evaluation Discussion: **Select one...**
 - Select one...
 - Meeting Conducted
 - Employee Unavailable
 - Employee Refused to Acknowledge Evaluation
- * Supervisor's Signature

5

SIGN THE FORM

- Click the "Supervisor's Signature" box.
- Type your name in the box.

Summary Section

- * Date of Evaluation Discussion: 02/21/2024
- * Results of Evaluation Discussion: Meeting Conducted
- * Supervisor's Signature: L

6

ACKNOWLEDGE THE EVALUATION

Scroll to the bottom of the page and click "Acknowledge Evaluation and Send to Employee."

Cancel Save and Close **Acknowledge Evaluation and Send to Employee**

7

CONFIRM YOUR APPROVAL

- A confirmation window will open.
- You may add notes to be included in the "Email Notification Comments."
- If you are finished with the form, click on "Acknowledge Evaluation and Send to Employee."

Acknowledge Evaluation and Send to Employee

You're about to route this form to another person to gather signatures. This form is sent in read-only format, and goes to your recipient's inbox. A copy of the form is also sent to your En Route folder.

Forward Form to NATHAN E

Acknowledge Evaluation and Send to Employee Cancel & Return to Form

