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Lesson 1: Managing Competencies

This Lesson covers three topics:

1.1 Adding/Editing competencies
1.2 Establishing competency weights
1.3 Establishing competency scoring ranges for scorecards

Learning Objectives

Upon completion of this Lesson, you will be able to:

- Add new competencies to the system
- Edit existing competencies
- Determine the weights for competencies
- Create scorecard color ranges that will be used for displaying competency scores on the Scorecard

Main Concepts

This lesson focuses on managing competencies within the performance management system. Competencies are the core skills or behaviors that your organization will be measuring employees against using evaluation forms. You are able to add as many competencies to the system as you need and have the ability to establish specific weights for competencies and can control the scoring ranges that will be used to display employees’ scores on competencies on the dashboard scorecards.

Usually, a finite number of competencies are identified and applied across multiple functions or job families. This is best accomplished by using a shared competency library. Furthermore, the overlap of competencies between jobs is needed to build logical career paths.
1.1 Adding/Editing competencies

You can create as many competencies as you need and manage them from within the performance management competency library.

<table>
<thead>
<tr>
<th>Competency</th>
<th>Weight</th>
<th>Red Values</th>
<th>Yellow Values</th>
<th>Green Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Service</td>
<td>4</td>
<td>0.00 - 1.99</td>
<td>2.00 - 3.99</td>
<td>4.00 - 5.00</td>
</tr>
<tr>
<td>Professionalism</td>
<td>1</td>
<td>0.00 - 1.99</td>
<td>2.00 - 3.99</td>
<td>4.00 - 5.00</td>
</tr>
<tr>
<td>Responsibility</td>
<td>1</td>
<td>0.00 - 1.99</td>
<td>2.00 - 3.99</td>
<td>4.00 - 5.00</td>
</tr>
<tr>
<td>Team Work</td>
<td>1</td>
<td>0.00 - 1.99</td>
<td>2.00 - 3.99</td>
<td>4.00 - 5.00</td>
</tr>
<tr>
<td>Work Ethics</td>
<td>1</td>
<td>0.00 - 1.99</td>
<td>2.00 - 3.99</td>
<td>4.00 - 5.00</td>
</tr>
</tbody>
</table>

Step-by-Step Process:

**Step 1:**
From the Home screen, click on the **Module** drop down and select **Admin Tools**.

**Step 2:**
Using the sidebar navigation menu, navigate to **Evaluations** > **Add/Edit Competencies**.
<table>
<thead>
<tr>
<th>Step 3:</th>
<th>To add a new competency, click on <strong>New Item</strong>. It may be hard to see.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 4:</td>
<td>Using the pop-up box, add the Competency name and a description of the competency using the fields provided. <strong>Click Save.</strong></td>
</tr>
</tbody>
</table>
1.2 Establishing competency weights

Competencies can be weighted according to the priority you want to give them within your performance management process. If you want to give all of your competencies the same weight, the easiest approach would be to set the weight at 1 for all competencies. If you want to vary the weights, you would determine a weighting approach and assign the weights according to the least common denominator in a whole number. For example, let’s assume your company has 5 competencies and you determine that you want Customer Service to carry twice as much weight for overall performance and the other 4 competencies to be weighted equally. The following table shows how these weights would be determined in this scenario:

<table>
<thead>
<tr>
<th>Competency</th>
<th>Weight</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiative</td>
<td>1</td>
</tr>
<tr>
<td>Reliability</td>
<td>1</td>
</tr>
<tr>
<td>Customer Service</td>
<td>2</td>
</tr>
<tr>
<td>Teamwork</td>
<td>1</td>
</tr>
<tr>
<td>Decision Making</td>
<td>1</td>
</tr>
</tbody>
</table>

When assigning weights to competencies and goals on an employee evaluation form, it's important to ensure that these truly reflect your organizational values and priorities. Getting agreement on weighting can sometimes be a challenge, but the ensuing discussion is always valuable. Be careful though—lack of agreement or buy-in can lead to confusion, frustration and resentment—in short, a disengaged workforce. Make sure that the weighting you've assigned properly reflects organizational priorities, and that everyone involved understands the weighting and will support it.

Step-by-Step Process:

**Step 1:**
From the Home screen, click on the Module drop down and select Admin Tools.
<table>
<thead>
<tr>
<th>Step 2:</th>
<th>Using the sidebar navigation menu, navigate to <strong>Evaluations &gt; Add/Edit Competencies</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><img src="image1" alt="Sidebar Navigation" /></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 3:</th>
<th>To add a new competency, click on <strong>+ New Item</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><img src="image2" alt="Adding New Item" /></td>
</tr>
</tbody>
</table>

| Step 4: | Using the pop-up box, add the weight for the competency in the Weight field. Click **Save**. |
|--------|-------------------------------------------------------------------------------------------------
|        | ![Pop-up Box](image3)                                                                          |
1.3 Establishing competency scoring ranges for scorecards

The performance management system provides powerful Dashboards and Scorecards, giving employees and managers the ability to track performance across your core competencies. The Scorecards present competency scores in Green, Yellow and Red colors for easy identification of above average, average and below average performers. In order to use the Scorecards most effectively, you must establish a scoring range for your competencies.

Figure 2: Performance Scorecard

Generally speaking, a 5-point Likert rating and scoring scale is recommended. You will specify your rating scale and labels when you are setting up your evaluation forms (Lesson 2). Most research suggests that rating scales with 5-7 points are ideal and that going beyond 7 points can become confusing for respondents. Using a 5-point scoring scale, a 5 represents the highest score and a 1 would represent the lowest score. In order to fine tune your scoring ranges, we recommend evaluating the overall distribution of performance scores across your employees after you have conducted your first performance evaluation and have scores for a majority of employees.
**Step-by-Step Process:**

<table>
<thead>
<tr>
<th>Step</th>
<th>Process</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1:</strong></td>
<td>From the Home screen, click on the <strong>Module</strong> drop down and select <strong>Admin Tools</strong>. <img src="image" alt="Module" /></td>
</tr>
<tr>
<td><strong>Step 2:</strong></td>
<td>Using the sidebar navigation menu, navigate to <strong>Evaluations &gt; Add/Edit Competencies</strong></td>
</tr>
<tr>
<td><strong>Step 3:</strong></td>
<td>To add a new competency, click on <strong>+ New Item</strong> <img src="image" alt="New Item" /></td>
</tr>
<tr>
<td><strong>Step 4:</strong></td>
<td>Using the pop-up box, add the Min and Max values for the Red, Yellow and Green Scorecard ranges. Click <strong>Save</strong>. <img src="image" alt="Score Card" /></td>
</tr>
</tbody>
</table>
Lesson 2: Creating Evaluation Forms

This Lesson covers these topics:

- 2.1 Creating a new form
- 2.2 Copying a Form
- 2.3 Deleting a form
- 2.4 Making a form inactive
- 2.5 Specifying form details and options
- 2.6 Adding form instructions
- 2.7 Adding Sign off workflow options
- 2.8 Adding questions to a form
- 2.9 Question Types
- 2.10 Linking questions to competencies
- 2.11 Linking goals to a form
- 2.12 Creating rating scales
- 2.13 Specifying question options

Learning Objectives

Upon completion of this Lesson, you will be able to:

- Create and Manage Rating forms
- Specify form details
- Setup form sign off workflow
- Understand the various question types
- Link questions to competencies
- Link questions to goals
- Create rating scales
Main Concepts

This lesson focuses on creating and managing your rating forms. Forms can be created for use in the Evaluation and 360 modules. You are able to choose questions types, assign competencies and link goals to a question. You are also able to determine the sign off workflow of each form.

Many companies use a one size fits all approach to creating performance evaluation forms. However, it is very likely that the job requirements and behaviors necessary to perform jobs well vary across jobs and levels (e.g. hourly, management, executive). We would recommend developing your evaluation forms based on a careful job-analysis that has identified the tasks and behaviors required to do the job well. This will result in a much better performance review and discussion between manager’s and their employees during the feedback sessions.

2.1 Creating a new form

You can create as many forms as you need and manage them from within the performance management form library. Forms can be completely new or created by copying an existing form. Forms can be active or inactive. A form can be copied whether it is active or inactive.
**Step-by-Step Process:**

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 1:</td>
<td>From the Home screen, click on the Module drop down and select Admin Tools.</td>
</tr>
<tr>
<td>Step 2:</td>
<td>Using the sidebar navigation menu, navigate to Evaluations &gt; Add/Edit Evaluations</td>
</tr>
<tr>
<td>Step 3:</td>
<td>To add a completely new form, click on + New Evaluation</td>
</tr>
<tr>
<td>Step 4:</td>
<td>Using the Form Details Screen you will enter the setup information for your form. Complete Form Details as shown in lessons 2.5-2.7</td>
</tr>
</tbody>
</table>
2.2 Copying a form

Forms can be created by copying an existing form in the Form Library. A form can be copied whether it is active or inactive.

**Step-by-Step Process:**

<table>
<thead>
<tr>
<th>Step 1: From the Home screen, click on the Module drop down and select Admin Tools.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 2: Using the sidebar navigation menu, navigate to Evaluations &gt; Add/Edit Evaluations</td>
</tr>
<tr>
<td>Step 3: To copying an existing form. Click on the Copy icon to create the copy.</td>
</tr>
<tr>
<td>Step 4: Click on the Details icon to modify the form setup. Click Save when complete</td>
</tr>
</tbody>
</table>
### 2.3 Deleting a form

Forms can be deleted from the Form Library. They will be permanently deleted and cannot be recovered.

**Step-by-Step Process:**

<table>
<thead>
<tr>
<th>Step</th>
<th>Process</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1:</strong></td>
<td>From the Home screen, click on the Module drop down and select Admin Tools.</td>
</tr>
<tr>
<td><strong>Step 2:</strong></td>
<td>Using the sidebar navigation menu, navigate to Evaluations &gt; Add/Edit Evaluations</td>
</tr>
<tr>
<td><strong>Step 3:</strong></td>
<td>To delete a form permanently Click on the Delete icon <img src="image" alt="Delete icon" /> You will be asked to verify the action. Click Ok</td>
</tr>
</tbody>
</table>
### 2.4 Making a form inactive

Instead of deleting a form, you can make it inactive to save it in your form library for later use or to be copied and modified.

**Step-by-Step Process:**

<table>
<thead>
<tr>
<th>Step 1:</th>
<th>From the Home screen, click on the <strong>Module</strong> drop down and select <strong>Admin Tools</strong>.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 2:</td>
<td>Using the sidebar navigation menu, navigate to <strong>Evaluations</strong> &gt; <strong>Add/Edit Evaluations</strong></td>
</tr>
<tr>
<td>Step 3:</td>
<td>To make a form inactive, Click on the Details icon</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Evaluation</th>
<th>Status</th>
<th>Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copy of 2015 Performance Evaluation</td>
<td>Active</td>
<td>05/06/2015</td>
<td>![file icon] ![info icon] ![trash icon]</td>
</tr>
<tr>
<td>Inspection Form</td>
<td>Active</td>
<td>05/04/2015</td>
<td>![file icon] ![info icon] ![trash icon]</td>
</tr>
<tr>
<td>Mystery Shopper</td>
<td>Active</td>
<td>05/04/2015</td>
<td>![file icon] ![info icon] ![trash icon]</td>
</tr>
<tr>
<td>360 Multi-Rater Review</td>
<td>Active</td>
<td>04/24/2015</td>
<td>![file icon] ![info icon] ![trash icon]</td>
</tr>
<tr>
<td>2015 Performance Evaluation</td>
<td>Active</td>
<td>10/17/2012</td>
<td>![file icon] ![info icon] ![trash icon]</td>
</tr>
</tbody>
</table>
2.5 Specifying form details

The Details screen allows you to specify information about the form and how it will behave in the system when being used for an evaluation. This section covers the title, logo, active/inactive, transferability, report type, form type, category and from ID.

Step-by-Step Process:

Step 1: From the Home screen, click on the Module drop down and select Admin Tools.

Step 2: Using the sidebar navigation menu, navigate to Evaluations > Add/Edit Evaluations

Step 3: Click on the Details icon
Step 4: The fields at the top of the screen allow you to:
1) Give the form a unique Title
2) Add a URL for an image to use for the logo on the form
3) Set the Active field
4) Indicate if the form Can be Transferred to someone other than the immediate manager for completion, i.e., the employee reported to another person for the greater portion of the evaluation period
5) Set the Report option – Standard Reports are used when there is no Self Evaluation or the Self Evaluation is separate from the Manager’s; Combined Self/Manager Evaluation Report is used to combine the two on the final report
6) Set the Form Type – how will the form be used – 360 Evaluation, Evaluation, Inspection, or Mystery Shopper
7) Choose the form Category, if setup in the system
8) Create a Form ID that can be used to create reports specific to this form
2.6 Adding form instructions

The Details screen allows you to add information that will appear at the top of the form. These can be used to provide instructions or even information about how to use the rating scale. You have total flexibility in what is entered.

The instructions you include on your evaluation forms are critical to the success of the evaluation process. Instructions should be clear, concise and detail exactly what the raters need to do. It is also recommended that you provide contact information for who raters should contact should they have questions about completing the form. Before you launch your evaluations, you should test your forms with a small sub set of employees to make sure the instructions are clear and easy to understand.

Step-by-Step Process:

<table>
<thead>
<tr>
<th>Step 1:</th>
<th>From the Home screen, click on the Module drop down and select Admin Tools.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 2:</td>
<td>Using the sidebar navigation menu, navigate to Evaluations &gt; Add/Edit Evaluations</td>
</tr>
<tr>
<td>Step 3:</td>
<td>Click on the Details icon</td>
</tr>
</tbody>
</table>
Lesson 2.7: Managing Notification Templates

This Lesson covers three topics:
- 2.7.1 Adding Notification Templates
- 2.7.2 Editing Notification Templates
- 2.7.3 Making a Notification Template Inactive
- 2.7.4 Adding a Notification Template to a Form

2.7.1 Adding Notification Templates
You can create as many Notification Templates as you need and manage them from within the performance management Notification Template library.
### Step-by-Step Process:

| Step 1: | From the Home screen, click on the **Module** drop down and select **Admin Tools**. |

| Step 2: | Using the sidebar navigation menu, navigate to **General > Setup > Notification Templates** |

| Step 3: | To add a new Notification Template, click on **New Item**. |

| Step 4: | Using the pop-up box, add the Notification Template Display Type, Template Type, Template Subject – Subject of Email or Text, and the Template body – body of email or text. |
Step 5: In the Notification Template Body add text as you wish. You can also click on the Drop Down to Insert Data into the email. These are fields that will populate and personalize the notice.

Click Save when complete.

**Employee ID** – Enters the Employee ID of the Employee being evaluated.

**Evaluation Link** – Inserts a link to the evaluation in the email.

**Form Name** – Enters the Form Name.

**Location Description** – Enters the Location for the employee being evaluated.

**Ratee Name** – Enters the Name of the Employee Being evaluated.

**Rater Name** – Enters the name of the employees rater.

**Scheduled Date** – Enters the date that the evaluation was scheduled.

**Score Avg** – Enters the Average score for the evaluation.

**Score %** - Enters the score percentage for the evaluation.
2.7.2 Editing/Deleting Notification Templates

Step-by-Step Process:

Step 1: From the Home screen, click on the Module drop down and select Admin Tools.

Step 2: Using the sidebar navigation menu, navigate to General > Setup > Notification Templates

Step 3: To Edit a new competency, click on Edit
### Step 4:
Using the pop-up box, edit the Notification Template Display Type, Template Type, Template Subject, and the Template body. Click **Save**.

![Notification Template](image)

### Step 5:
To Delete a Notification Template, click on **Delete**
2.7.3 Making a Notification Template Inactive

Step-by-Step Process:

Step 1: From the Home screen, click on the Module drop down and select Admin Tools.

Step 2: Using the sidebar navigation menu, navigate to General > Setup > Notification Templates

Step 3: In the Active section of the Notification Template library uncheck the checkbox to make the Notification Template inactive.
2.7.4 Adding a Notification Template to a Form

**Step-by-Step Process:**

**Step 1:** From the Home screen, click on the Module drop down and select Admin Tools.

**Step 2:** Using the sidebar navigation menu, navigate to Evaluations > Add/Edit Evaluation

**Step 3:** Click on the **+ New Evaluation** button. Or - Go to Details Page of existing Eval
Step 4: Scroll down to the Notifications section of the page and click on **Add Notification**

![Add Notification button]

Step 5: Click on the drop down for **Template** and click on the Notification Template you would like to add to the Evaluation Form.

You can also choose from what **Perspective** the Notification Template will be viewed - **WHO SHOULD GET THE NOTICE**. Click on the **Perspective** drop down and choose one of the options shown.

You can also choose the **Schedule Type** for this Notification Template. The next section will describe each **Schedule Type**.
Step 6: Choosing **Days After Schedule – One Time**

Insert the days after the scheduled date you would like the notification to run.

Choosing **Days After Schedule – Recurring** will populate three text area options. They are self-explanatory.

**Days After Scheduled (For the first delivery)**

When will the first notice be sent - specified days after the initial schedule.

**Recurring Interval Days**

How often will notification be sent - every specified number of days after the initial notification.

**Days After Scheduled, when the Recurring Ends**

When will the recurring notifications stop being sent - specified days after the initial notification.
<table>
<thead>
<tr>
<th>Using <strong>Upon Completion</strong> Schedule Type will send the notification upon completion of the Evaluation Form.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 7:</strong> When complete click <strong>Save</strong> to save the Notification Template to the Evaluation or <strong>Cancel</strong> to cancel.</td>
</tr>
</tbody>
</table>
2.8 Adding a sign off workflow

Evaluation forms will automatically flow from the employee, if a self-eval is part of the process, to the manager when the self-eval is completed. If no self-eval is used, the manager will automatically receive the form first. The Sign Off Workflow section of the Details page will allow you to specify an approval or sign off workflow after the manager has completed the form. This allows people to review the form and either sign off on it as good or re-open it and send it back to the manager with comments. Comments cannot be made directly on the form, but can be added to a pop-up which is incorporated into an email to the manager. If the sign off workflow is utilized, the form does not become completed until the final signing off has been completed. If a form is sent back to the manager at any step of the sign-off process, the entire sign off workflow begins again.

**Step-by-Step Process:**

<table>
<thead>
<tr>
<th>Step 1:</th>
<th>From the Home screen, click on the <strong>Module</strong> drop down and select <strong>Admin Tools</strong>.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 2:</td>
<td>Using the sidebar navigation menu, navigate to <strong>Evaluations &gt; Add/Edit Evaluations</strong></td>
</tr>
<tr>
<td>Step 3:</td>
<td>Click on the Details icon</td>
</tr>
</tbody>
</table>
Step 4: Go to the bottom of the Details screen to the Sign Off Workflow section. Click Add New.

Step 5: On the setup screen select the Sign Off Type from the dropdown. People added will be sent a notification that the form is waiting in their Approval Queue. The workflow will follow the sequence you create using the Order field, starting with the lowest number you enter. Click Save in the Workflow section after each choice.

**Employee** - choose employee if you want the person being rated to sign off on the form before it is complete.

**Manager** - choose Manager if you want the manager of the person being rated to sign off on the form before it is complete.

**Individual** - choose Individual if you want to specify a person by name to be part of the sign off workflow. Choosing this option will bring up a list of all Active people in the account. You click on the name you want to add.
### Job Code

- **Job Code** - choose Job Code to specify an individual Job Code to include in the workflow.

```
<table>
<thead>
<tr>
<th>Order</th>
<th>Sign Off Type</th>
<th>Detail</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Job Code</td>
</tr>
</tbody>
</table>
```

### Location Manager

- **Location Manager** - choose Location Manager to include the person who is listed in the company setup as the Location Manager for the person being rated.

```
<table>
<thead>
<tr>
<th>Order</th>
<th>Sign Off Type</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Location Manager</td>
</tr>
</tbody>
</table>
```

### Step 6: Workflow Complete

- **Workflow Complete** - When you have saved the separate levels of your workflow, the final setup would look like this example. If you wish to make changes you will need to delete the necessary levels and create new versions.

Click **Save** to save the Form Details setup information.

```
<table>
<thead>
<tr>
<th>Sign Off Workflow</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Order</td>
<td>Type</td>
</tr>
<tr>
<td>Delete</td>
<td>1</td>
</tr>
<tr>
<td>Delete</td>
<td>1</td>
</tr>
</tbody>
</table>
```

---

**Save**  **Cancel**
2.9 Adding questions to a form

Questions can be added to forms in two ways. You can create a new question by choosing the question type from the list and completing the question setup (see 2.9 - 2.13). You can also choose one or more questions from a form already in your form library. When you follow this method, the new question setup will be copied just as it was on the original question.

When adding questions to an evaluation form, we recommend including both rating scale questions as well as open-ended text boxes. This will allow managers or those completing the evaluation forms to provide additional written feedback to support their rating.

Step-by-Step Process:

Step 1: From the Home screen, click on the Module drop down and select Admin Tools.

Step 2: Using the sidebar navigation menu, navigate to Evaluations > Add/Edit Evaluations

Step 3: Choose the form to which you want to add questions. Click on the Questions icon 😁
Step 4: If the form does not have questions it will be blank.

If you are adding questions to an existing form, the questions will appear.

The steps that following will start with a new form, but the process is the same if you are adding to an existing one.

Step 5: On the Question screen, click on **New Question**

Step 6: Add a new question by clicking the dropdown under **Blank Question** or **Clicking on the name** of an existing form.

Step 7: Choose the question type you want to use by clicking on the question type in the dropdown.
2.10 Question Types

In the section that follows each question type is defined. The top image on the right show the section of the setup screen that is pertinent for that question type. The lower image shows how the question looks like on an actual form.

### Drop Down Rating Scale

You may add as many rows as needed and select the minimum and maximum values to display. You can choose a competency to associate with each row. You can also add an NA if needed. **If you use an N/A response, set the Weight to 0 and the Values to -1**

This question type **will** send competency scores to the Succession Planning module.

### Text Box Type

This question allows you to gather information in text format. You can have multiple rows gathered in the same question, such as Name and Address.

This question type **will NOT** send competency scores to the Succession Planning module.

### Date Type

A Date Type question will allow you to add a date to the form. A popup calendar will be shown next to the date field. A date can also be entered directly into the field.

This question type **will NOT** send competency scores to the Succession Planning module.
Radio Button Type
You may add as many rows as needed for each choice. The display defaults to vertical. Choices can be weighted and values added. The values will be used to determine scores and provide information in the Succession Planning module.

If you use an N/A response, set the Weight to 0 and the Value to -1

You can choose to display the choices horizontally by checking the Display Rows Horizontally box. Make sure you change the Column Count to equal the number of rows.

This question type will send competency scores to the Succession Planning module.

Text Area Type
This question type allows you to gather information in a narrative text format. The responses can be entered in a text area which can be expanded on the screen to show more of what has been typed. The text will wrap automatically. All text type in the box will be displayed on the PDF version of the form.

This question type will NOT send competency scores to the Succession Planning module.
<table>
<thead>
<tr>
<th>Image Upload Type</th>
<th>There is no special setup for this question type other than to indicate that an image can be added</th>
</tr>
</thead>
<tbody>
<tr>
<td>You can use this question type to add images to a form. This type is useful on Inspection and Mystery Shopper forms. You can upload .jpg, .png, or .gif files. These images will display in the PDF.</td>
<td><img src="image_url" alt="Image Upload Type" /></td>
</tr>
<tr>
<td>This question type will NOT send competency scores to the Succession Planning module.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Audio Upload Type</th>
<th>There is no special setup for this question type other than to indicate that an image can be added</th>
</tr>
</thead>
<tbody>
<tr>
<td>You can use this question type to add audio files to a form. This type is useful on Inspection and Mystery Shopper forms. MP3 files work best because of the size.</td>
<td><img src="image_url" alt="Audio Upload Type" /></td>
</tr>
<tr>
<td>This question type will NOT send competency scores to the Succession Planning module.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Time Interval Type</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>This question allows you to indicate a duration of time. An example of this might be the length of time for service at a restaurant.</td>
<td><img src="image_url" alt="Time Interval Type" /></td>
</tr>
<tr>
<td>This question type will NOT send competency scores to the Succession Planning module.</td>
<td></td>
</tr>
</tbody>
</table>

Time Interval Type
How long did it take you to get your food?
Hours: 0
Minutes: 0
Radio Button Matrix Type
You can use this question type to present items that are all to be rated using the same scale. This is a typical question type for a 360 review or evaluation form.

The **Choices** are the rating options. The values carry over into the Succession Planning module.

The **Rows** are the items you want to be rated. Each Row can be associated with a competency.

This question type will send competency scores to the Succession Planning module.

---

Drop Down Type
You can use this question type present multiple choices in a drop down list format.

This question type will **NOT** send competency scores to the Succession Planning module.

---

Numeric Text Box Type
This question allows you to gather a response that can only be entered in numeric format, no alpha characters.

This question type will **NOT** send competency scores to the Succession Planning module.
2.11 Linking questions to competencies

Questions can be linked to the competencies you have setup in your system. The question types that allow this have a field with the competencies listed in a drop down. For the Drop down Rating, Radio Button and Radio Button Matrix question types, associating the question with a competency will move the rating(s) for that competency to the Succession Planning module. A competency may be associated with more than one question. In that instance, the scores will be averaged for that competency. Typically competencies would be added when the question is initially setup. In that case, skip to Step 5.

Step-by-Step Process:

<table>
<thead>
<tr>
<th>Step 1:</th>
<th>From the Home screen, click on the Module drop down and select Admin Tools.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 2:</td>
<td>Using the sidebar navigation menu, navigate to Evaluations &gt; Add/Edit Evaluations</td>
</tr>
<tr>
<td>Step 3:</td>
<td>Choose the form to which you want to work. Click on the Questions icon</td>
</tr>
</tbody>
</table>
Step 4: Click on the **Edit** icon specific question you wish to add a competency association.

Step 5: Adding the competency association varies based on the question type, but you will always be presented with a drop down list.

**Radio Button Type**
The competency drop down is located in the Additional Questions Setting box. Choose the competency for this question from the list.

**Radio Button Matrix Type**
The competency drop down is located in the Setup Rows box. For this question type each row may be associated with the same or differing competencies.

**Drop Down Rating Type**
The competency drop down is located in the Setup Answers box. For this question type each row may be associated with the same or differing competencies.
### 2.12 Linking goals to a form

Goals that have been created in the system can be brought onto a form automatically by setting up a **Text Area Type** question and making it goal driven. This process would normally be completed when the question was setup, in which case you would begin at Step 5.

**Step-by-Step Process:**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1:</strong></td>
<td>From the Home screen, click on the <strong>Module</strong> drop down and select <strong>Admin Tools</strong>.</td>
</tr>
<tr>
<td><strong>Step 2:</strong></td>
<td>Using the sidebar navigation menu, navigate to <strong>Evaluations &gt; Add/Edit Evaluations</strong>.</td>
</tr>
<tr>
<td><strong>Step 3:</strong></td>
<td>Choose the form to which you want to work. Click on the <strong>Questions</strong> icon 🤔.</td>
</tr>
<tr>
<td><strong>Step 4:</strong></td>
<td>Click on the <strong>Edit</strong> icon for the specific question you wish to bring in a goal.</td>
</tr>
</tbody>
</table>
Step 5: The option to make a question goal driven is located in the Additional Question Settings box. You will need to set up a question for each goal you want brought into the form. These are often followed by a rating and or comment question.

When the question displays on the form it will include the goal and the goal description.

2.13 Creating rating scales

It is common practice to use rating scales as a way to evaluate performance on various objectives or competencies. This section looks at how you set up a common rating scale using the Drop down Rating Scale, Radio Button Matrix and Radio Button question types.

Generally speaking, a 5-point Likert rating and scoring scale is recommended. You will specify your rating scale and labels when you are setting up your evaluation forms (Lesson 2). Most research suggests that rating scales with 5-7 points are ideal and that going beyond 7 points can become confusing for respondents. Using a 5 point scoring scale, a 5 represents the highest score and a 1 would represent the lowest score. In order to fine-tune your scoring ranges, we recommend evaluating the overall distribution of performance scores across your employees after you have conducted your first performance evaluation and have scores for a majority of employees.

The steps in this section begin after those found in section 2.9 Adding questions to a form.
**Drop Down Rating Scale**
You may add as many rows as needed and select the minimum and maximum values to display. You can choose a competency to associate with each row. You can also add an NA if needed.

<table>
<thead>
<tr>
<th>Setup Answers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Row</td>
</tr>
<tr>
<td>Row</td>
</tr>
<tr>
<td>Time Management</td>
</tr>
<tr>
<td>Job Knowledge</td>
</tr>
<tr>
<td>Production</td>
</tr>
</tbody>
</table>

**Dropdown Rating Scale Question Type**
| Time Management |
| Job Knowledge  |
| Production     |

**Radio Button Matrix Type**
You can use this question type to present items that are all to be rated using the same scale. This is a typical question type for a 360 review or evaluation form.

The **Choices** are the rating options. The values carry over into the Succession Planning module.

The **Rows** are the items you want to be rated. Each Row can be associated with a competency.

<table>
<thead>
<tr>
<th>Setup Choices</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Choice</td>
</tr>
<tr>
<td>Choice</td>
</tr>
<tr>
<td>Far Exceeds</td>
</tr>
<tr>
<td>Exceeds</td>
</tr>
<tr>
<td>Developing</td>
</tr>
<tr>
<td>Meets Minimum</td>
</tr>
<tr>
<td>Below</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Setup Rows</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Row</td>
</tr>
<tr>
<td>Row</td>
</tr>
<tr>
<td>Open Minded</td>
</tr>
<tr>
<td>Dedication</td>
</tr>
</tbody>
</table>

**Radio Button Matrix Type**
How does this person meet expectations for these competencies?

- Open Minded
- Problem Solver
Radio Button Type
You may add as many rows as needed for each choice.
The display defaults to vertical. Choices can be weighted and values added. The values will be used to determine scores and provide information in the Succession Planning module.

You can choose to display the choices horizontally by checking the Display Rows Horizontally box. Make sure you change the Column Count to equal the number of rows.
2.14 Specifying question options

Each question allows you to specify options about the action of the question. In this section we will go through each option. These would normally be setup as you were setting up the question.

Make Question Active -
Uncheck this box to make a question inactive so that it will not display on the form. The default is Active.

Make Question Required -
Check this box to make the rater complete the question before being able to Save as Complete. The default is off.

Make Entire Question Text Bold -
The default is on, making all of the question bold. You can turn this off and make only certain words or phrases bold using the HTML editor.

Create Page Break After Question – This allows you to create forms with multiple pages. The default is off.

Hide Question on Self Form – This option allows you to use the same form for the Manager and Self Eval by hiding Manager only questions. The default is off.

<table>
<thead>
<tr>
<th>Additional Question Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make Question Active</td>
</tr>
<tr>
<td>Make Question Required</td>
</tr>
<tr>
<td>Make Entire Question Text Bold</td>
</tr>
<tr>
<td>Create Page Break After Question</td>
</tr>
<tr>
<td>Hide Question on Self Form</td>
</tr>
<tr>
<td>Category</td>
</tr>
<tr>
<td>Question ID</td>
</tr>
<tr>
<td>Competency</td>
</tr>
<tr>
<td>Manager Guest Experience</td>
</tr>
</tbody>
</table>
**Category** – This option allows you to assign the form to a category you have setup in your system.

**Question ID** – this is an ID you ascribe to the question. It can be used to pull responses onto the report.

**Competency** – This drop down allows you to associate a specific competency with the question. Normally you would do this only on a rating question that can push scores into the Succession Planning module.

### Additional Question Settings:

- **Make Question Active**: 
- **Make Question Required**: 
- **Make Entire Question Text Bold**: 
- **Create Page Break After Question**: 
- **Hide Question on Self Form**: 

<table>
<thead>
<tr>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Question ID</td>
</tr>
</tbody>
</table>

| Competency     | Manager Guest Experience |
Lesson 3
Scheduling and Assigning Evaluation Forms

- 3.1 Scheduling evaluation forms with the Evaluation Schedule Wizard
- 3.2 Scheduling evaluation forms for specific individuals

Learning Objectives

Upon completion of this Lesson, you will be able to:
- Schedule evaluation forms by hire date
- Schedule evaluation forms by last promotion date
- Schedule evaluation forms by next evaluation date
- Schedule evaluation forms that reoccur at prescribed intervals
- Schedule an evaluation form for a specific individual

Main Concepts

This lesson focuses understanding how to schedule and assign evaluation forms using the Evaluation Schedule Wizard and the Manager's Tools.

Notes:
- Only a person with the Administrative roles can use the Scheduling Wizard
- The Scheduling Wizard is the only way to send Self Evals
- Managers can assign forms using the Manager Tools. Typically this is used to assign a form for them to complete about one of their Team Members.
3.1 Scheduling evaluation forms with the New Evaluation Schedule Wizard

Scheduling the release date for evaluation forms is accomplished in the Evaluation Admin area. You have flexibility around the event that triggers the release of the forms. Forms can be used for individual assignment as well as through the group scheduling feature, which will be outlined in this section. One Time schedules are run at regular intervals throughout each day. Recurring schedules run at midnight each day.

Step-by-Step Process:

Step 1: From the Home screen, click on the Module drop down and select Admin Tools.

Step 2: Using the sidebar navigation menu, navigate to Evaluations > Evaluation Schedules

Step 3: To schedule a new evaluation click on New Item
Step 4: The Evaluation Schedule Wizard will now walk you through step by step in setting up an Evaluation Schedule. The first tab is the Schedule Info tab.

Enter Evaluation Schedule Name in this space provided.

It’s a good idea when first starting out to not mark the Active field until you are finished with the schedule in order to not send notices out by mistake. The schedule will not run until this box is checked.

Hide in Employee History is used if you don’t want to have a record that is viewable by the employee at a later date.

Click Next when you’re done with this page.

Step 5: The next tab in the process is the Evaluations tab.

In the Drop Down Box choose the evaluation you want to use with this schedule.

The next Drop Down Box gives the option to make it a Self-evaluation or to be sent to a specific Manager Type.

Click the +Add button to add the Evaluation to the current project.
The Evaluation now populates in the Evaluation Name, Perspective, and Order columns. Feel free to add as many as you need in order to fulfill the requirements for the project. This sample is typical for a Self Eval being completed first and triggering the release of the form to the Manager. All PDFs of the completed forms will be bundled when completed.

Send Forms all at once - leave this unchecked to send the forms staggered, in the order you listed, i.e., completion of the first form to trigger the release of the next, and so on. If the box is checked all forms will go at the same time. When all forms go out together, the last form completed triggers the sign off process. The name of that form and rater will be listed in the Approval Queue.

Click Next to continue.

SELF EVALUATIONS

The only way to send an evaluation to an employee to complete about himself/herself is using the Scheduling Wizard.

In Step 2—Evaluations, you must choose SELF as the Perspective. The example shown above is a typical setup for a Self Eval being completed first and releasing the next form to the Manager for completion.

If you only wish to send the form to the Team Member to complete about himself/herself, just choose the form and the Self Perspective

In Step 4—Employees & Finish Insert, make sure you choose the specific Team Member or Group you want to complete the Self Eval.
Step 6: This Launch Date tab gives you the ability to make this a One-Time Evaluation or to have Recurring Evaluations that will repeat at intervals you determine. Click the circle next to the setup option you want to use.

**One-time Evaluation**

- **Specific Date** – choose the exact date to send the forms.
- **Days After** – set a specific number of days after the Hire or Last Promotion Date. If you choose the Last Promotion Date and that field is empty, the Hire date will be used.
- **Days Before or After** – set a date based on the Next Evaluation Date.

**Recurring Evaluations**

- **Days After** – set a specific number of days after the Hire or Last Promotion Date. If the Last Promotion Date is empty, the Hire date will be used.
- **Days Before or After** – set a date based on the anniversary of the Hire or Last Promotion Date
- **Starting on a Specific Date** – choose the number of days or months you want a form sent after a specific date.
### Examples

**You want an initial eval 90 days after someone is hired**

**You want a yearly eval sent 14 days before the anniversary of the hire date**

Click **Next** to continue.

---

**Step 7: Employee & Finish tab**

In this tab you will choose which employees to send the project to.

You can send them to **All Active Employees** which will populate the number of employees currently active in the Perform Module.

You can also send them to **Specific Employees**

The last section is sending by a certain **Group of Employees**. There are filters in place in this section to coordinate your search for the group you would like to send them to.

When the requirements for your current **Evaluation Project** have been setup click the **Finish** button.

---

These **Group of Employee** filters can be combined. Example – you could choose a **Location** and a **Job Code**.

If you combine the filter ALL requirements must be met to have the form sent for an individual, i.e., for the example above they must be in that **Location** and have that **Job Code**.
Step 8: The Evaluation Schedule Wizard will present a Summary of the Schedule detailing your choices.

You have the option of Editing the Evaluation Schedule or Creating a new Evaluation Schedule. If everything looks good click on Edit this Evaluation Schedule and click on the Active check box that appears on the first tab of the process, then click on the Employees & Finish Tab and the Finish Button to save.

You can make changes to a schedule until it has been used – meaning forms have been sent. It will still have the word EDIT in the left column beside the name. Once the schedule has been used that will change to VIEW and you can only view the summary.

If you need to stop a schedule that has already been used, click on TRUE in the Active column. Once you confirm you wish to change the status of the schedule it will make it INACTIVE. (False)

If you have forms that are INACTIVE you can view them by checking the Include Inactive box.
3.2 Scheduling evaluation forms for specific individuals using Manager Tools

This feature allows a form to be scheduled for a specific individual. This could be helpful for a follow up evaluation after a probationary period, a developmental review or one the Manager wishes to do outside of the normal evaluation time. Only a Manager can schedule these forms to be assigned. Managers can only assign form to be completed about their own Team Members. Evaluations and forms assigned this way are immediately available for completion.

Step by step process:

<table>
<thead>
<tr>
<th>Step 1:</th>
<th>From the Home screen, click on the Module drop down and select Evaluations.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 2:</td>
<td>Using the sidebar navigation menu, navigate to Manager Tools &gt; Assign Evaluations</td>
</tr>
<tr>
<td>Step 3:</td>
<td>On this screen you choose the form to use, the employee, and who is to complete the form.</td>
</tr>
<tr>
<td></td>
<td><strong>Evaluation</strong>- Select Form from drop down box</td>
</tr>
<tr>
<td></td>
<td><strong>Employee</strong>- Select employee</td>
</tr>
<tr>
<td></td>
<td><strong>Rater</strong>- Normally this would be Yourself, but select the option that applies</td>
</tr>
</tbody>
</table>

Lesson 4
Administrative Access to Evaluations

- 4.1 Viewing completed forms
- 4.2 Administrative Screens and Employee Profile

Learning Objectives

Upon completion of this Lesson, you will be able to:
- View PDFs of evaluation forms once completed from the Performance Module
- View PDFs of evaluation forms once completed from the Succession Planning Module
- View PDFs of evaluation forms once completed from the Admin Screens
- Understand how the Employee Profile can be used to view evaluation information

Main Concepts

This lesson will explain how and where evaluation information can be viewed and printed from within the account. Using the competency features described in previous sections, the forms will transfer information to the Succession Planning Module. Completed forms can be viewed there as well as in scorecard formats that allow comparison of pre-established groups. Employees will have access to view and/or print completed forms within the Performance Module.
4.1 Viewing completed forms

Forms can be viewed by managers and employees several places within the system. Many of these areas are permission based.

**Step by step process:**

<table>
<thead>
<tr>
<th>Step 1:</th>
<th>View forms within the Performance Module . . . From the Home screen, click on the Module drop down and select Evaluations.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 2:</td>
<td>Using the sidebar navigation menu, navigate to My Evaluations</td>
</tr>
<tr>
<td>Step 3:</td>
<td>Click on the PDF icon to open and view/print the completed form</td>
</tr>
</tbody>
</table>

![Module dropdown]

![Sidebar navigation menu]

![PDF icon]
4.2 Administrative Screens and Employee Profile

Forms can be viewed by managers and administrators several places within the system. These areas are permission based.

**Step by step process for Admin Only area:**

<table>
<thead>
<tr>
<th>Step 1:</th>
<th>View forms within the LMS Admin area - Administrator access only . . .</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>From the Home screen, click on the <strong>Module</strong> drop down and select <strong>Admin Tools</strong>.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 2:</th>
<th>Using the sidebar navigation menu, navigate to <strong>General&gt;Setup&gt;People</strong></th>
</tr>
</thead>
</table>

---

**General**
- **Impersonate**
- **Locations**
- **Setup**
  - **Audiences**
  - **Categories**
  - **Concepts**
  - **Cost Centers**
  - **Custom Roles**
  - **Departments**
  - **Institutes**
  - **Instructors**
  - **Job Codes**
  - **Notices**
  - **Organizations**
  - **People**
  - **Vendors**
### Step 3:
Click on the **Edit to the left of the name of the person for whom the eval was completed** to go to the **People Profile screen**.

![People Profile Screen](image)

### Step 4:
Click on the **Evaluations tab** to open a list of assigned and completed evaluation forms.

![Evaluations Tab](image)

### Step 5:
This screen will display all forms that have been assigned. You can click on the name of the form to view/print the form. It will display on screen even if it is incomplete.

If the form is complete there will be the word **Reopen** in the left column. An Admin user can reopen the form and send it back to the person who completed it by clicking Reopen.

A completed form will also have a check in the **Complete Column** and a **Date in the Complete Date Column**.

![Evaluations List](image)