

Completing the Appraisal Process

After the Reviewer has taken action on an appraisal, the Rater can confirm the review has occurred by clicking the “Update Incomplete Appraisals” link on the Rater’s Home Page.

The screenshot shows the top navigation bar with links: Home, My Employees, My Reviews, System Administration, My Agency Admins, Proxy, Reports, Online Help, and Log Out. Below this is the "Home Page" header. The main content area is divided into two columns. The left column, titled "Raters", includes a "My Employee List" section with a link to "View My Current Employees" and a "Performance Plans (Objectives)" section with a link to "Develop/Update Performance Objectives". The right column, titled "Performance Appraisals (Ratings and Annual Rating Exemptions)", contains several links: "Create New Appraisal", "Update Incomplete Appraisals / Overturn Completed Appraisals" (with a tooltip: "Allows you to access existing appraisals within the current appraisal period."), "View Current Complete and Exempt Appraisals", "View All Complete and Exempt Appraisals", "View All Incomplete Appraisals", and "Search Appraisals".

Selecting this link will bring up the Select Performance Appraisal page which provides a list of appraisals the Rater has started. The “paperclip” icon identifies the appraisals containing attachments added by the Rater. The “**NEW**” indicator tells the Rater that the Reviewer has provided a “sticky note” containing comments or recommendations for an appraisal. The Appraisal Status will indicate whether the Reviewer has Approved or Disapproved a submitted appraisal.

The “[Edit](#)” link is used by the Rater to open an appraisal.

The screenshot shows the "Select Performance Appraisal" page. At the top, there is a header with the PERforM logo and the text "The Missouri State Employee Online Performance Appraisal System" and "Productivity, Excellence and Results for Missouri". Below the header is a navigation bar with links: Home, My Employees, Reports, Online Help, and Log Out. The main content area is titled "Select Appraisal" and includes a sub-header "The following are existing appraisals within the current appraisal period. (4) appraisals". Below this is a table with the following columns: Edit, Employee Name, Job Title, Organization, Supervisor, Type, Appraisal Status, and Date Modified.

Edit	Employee Name	Job Title	Organization	Supervisor	Type	Appraisal Status	Date Modified
Edit  NEW	AGGELER, CAROLYN A.	COMPUTER INFO TECH SPEC II	ITSD-SYSTEMS & PROGRAMMING	PETERSON, DONNA	Special	Approved	04/25/2007
Edit 	BERHORST, JOHN F.	COMPUTER INFO TECHNOLOGIST III	ITSD-SYSTEMS & PROGRAMMING	PETERSON, DONNA	Annual	In Progress	04/19/2007
Edit NEW	FIFE, BRENDA K.	COMPUTER INFO TECHNOLOGIST III	ITSD-SYSTEMS & PROGRAMMING	PETERSON, DONNA	Annual	Disapproved	04/19/2007
Edit	REINSTEIN, BERT	COMPUTER INFO TECH SPEC I	ITSD-SYSTEMS & PROGRAMMING	PETERSON, DONNA	Annual	In Progress	04/20/2007

The Edit Performance Appraisal page for the selected appraisal will open.

The screenshot displays the PERforM web application interface. At the top, there is a header with the PERforM logo and the text 'The Missouri State Employee Online Performance Appraisal System'. Below the header, there is a navigation bar with links for 'Home', 'My Employees', 'Reports', 'Online Help', and 'Log Out'. The main content area is titled 'Edit Performance Appraisal' and contains several sections:

- Employee Details:** A table showing information for Carolyn A. Aggeler, including her job title (COMPUTER INFO TECH SPEC II), supervisor (DONNA PETERSON), agency (OFFICE ADMINISTRATION-OPER), and organization (ITSD-SYSTEMS & PROGRAMMING).
- Performance Appraisal Details:** A table showing appraisal type (Special), rating period (-), overall score (6.6), appraisal status (Approved), appraisal date (4/25/2007 12:28:32 PM), and overall rating (Successful).
- 1. Knowledge of Work:** A section with a rating scale from 1 to 10 and a text area for performance objectives and comments.
- 2. Quality of Work:** A section with a rating scale from 1 to 10 and a text area for performance objectives and comments. The comments area contains the text 'CONDENSED SCREEN PRINT' and 'Not all Performance Components are shown'.

At the bottom of the page, there is a summary bar showing 'Appraisal Status: Approved', 'Overall Score: 6.6', and 'Overall Rating: Successful'. Below this, there are several buttons: 'Calculate Only', 'Save', 'Submit', 'Exempt & Submit', 'Complete Appraisal', 'Overturn Appraisal', 'Attachments', 'View Sticky Notes', 'Print Preview', and 'Back to top'. A tooltip is visible over the 'View Sticky Notes' button, stating: 'Click this button to view notes provided by the Reviewer regarding the appraisal.'

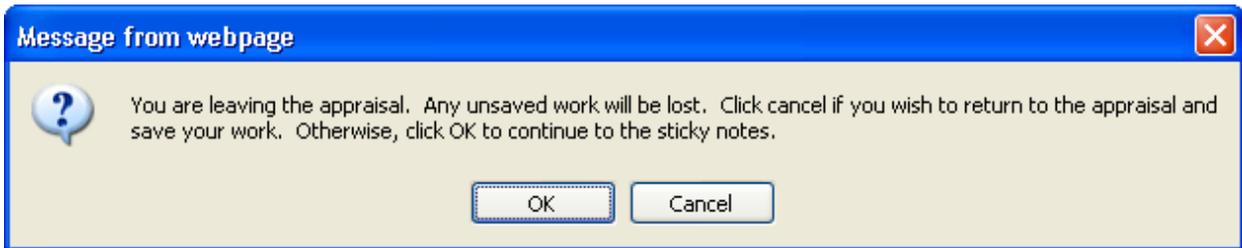
While the appraisal is in “**Disapproved**” or “**Pending**” status, the Rater can add/remove attachments, adjust ratings, and edit comments as necessary based on the Reviewer’s recommendations. Once this has occurred, the Rater will again submit the appraisal to the Reviewer for approval.

If the appraisal is “**Approved,**” the rater can print the appraisal and use the “Complete Appraisal” button to finalize the appraisal process.

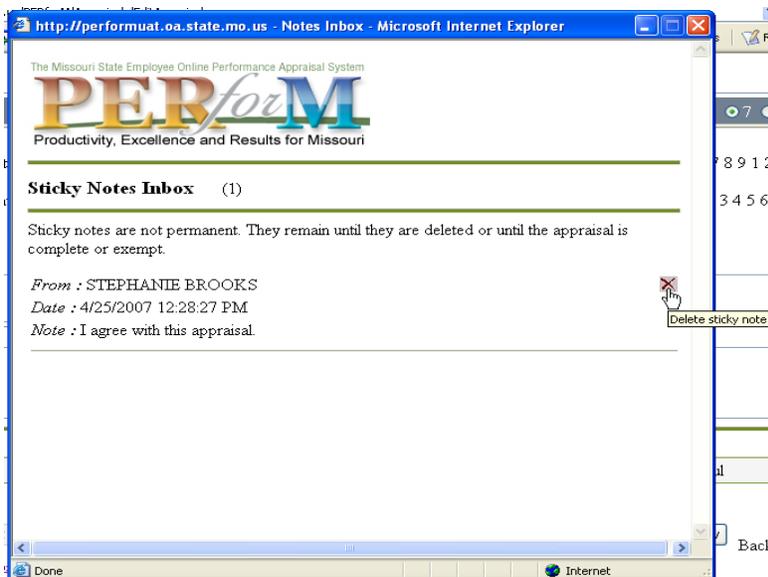
Viewing “Sticky Notes”

From the Edit Performance Appraisal page, the rater will be able to view “sticky notes” by clicking the “View Sticky Notes” button.

However, before the sticky note appears, a pop-up message will first remind the Rater to save any unsaved work on the appraisal.

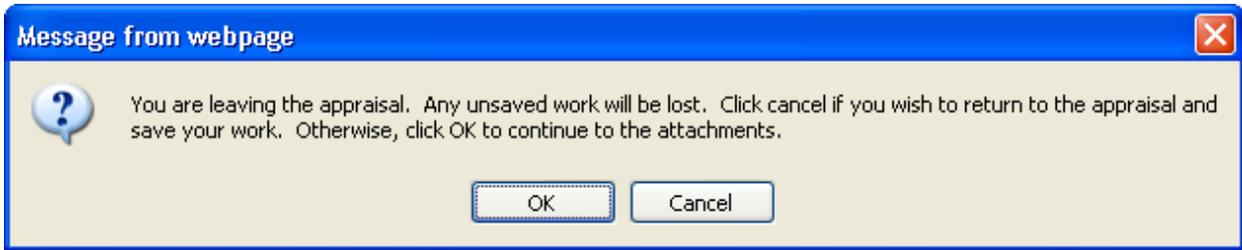


Clicking the “OK” button brings up the note the Reviewer sent. The Rater can either delete the note by clicking the “X” icon or keep the note by closing the window. At the conclusion of the appraisal process, any remaining sticky notes will be purged from PERforM and will not be retained as part of the appraisal.



Adding/Viewing Attachments

When clicking the “Attachments” button on the Edit Performance Appraisal page, the Rater will first encounter a pop-up message to remind the Rater to save any unsaved work on the appraisal.



Clicking the “OK” button on the pop-up message displays the following page. The rater can add an attachment by using the “Browse” button, selecting the appropriate file, and then using the “Upload File” button. To remove an attachment from an appraisal, the Rater clicks on the “X” icon that appears to the right of the listed file name.



Printing the Appraisal

The Rater can click the “Print Preview” button to print a paper copy of the appraisal.

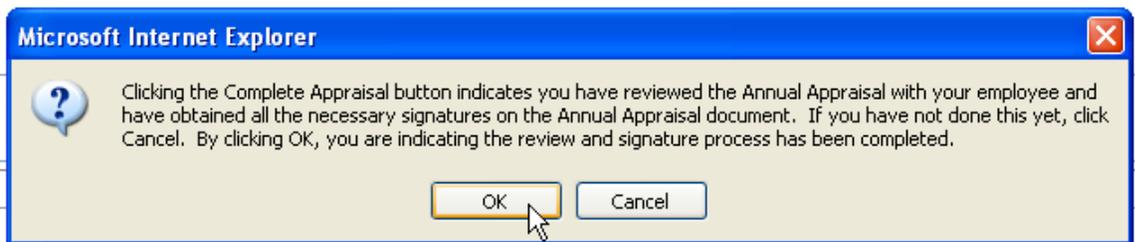


Indicating the Appraisal has been Reviewed with the Employee

To indicate that the employee has received the appraisal and that the appraisal has been signed by the Rater, Reviewer and employee, the Rater will click the “Complete Appraisal” button near the bottom of the page.



A confirmation message will be displayed as a reminder that this should occur *before* the appraisal is marked as “Complete” in the system.



The appraisal cannot be changed after it has been approved by the Reviewer unless it is marked as “Complete” and then later overturned.