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.

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 Edit Performance Appraisal page for the selected appraisal will open.

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.
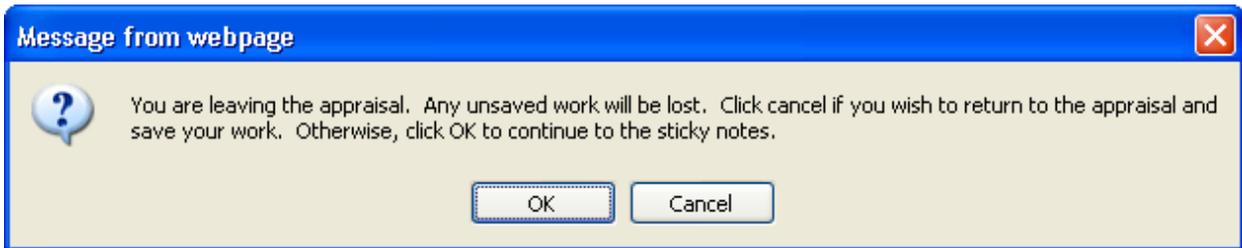
Clicking the "OK" button brings up the note the Reviewer sent. The Rater can either delete the note by clicking the "**X**" icon or keep the note by closing the window. At the conclusion of the appraisal process, any remaining sticky notes will be purged from PER*for*M and will not be retained as part of the appraisal.
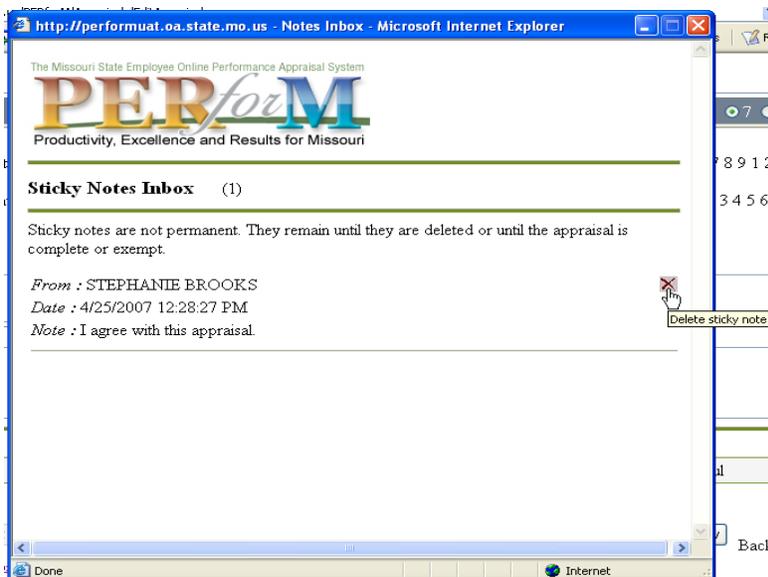
Adding/Viewing Attachments

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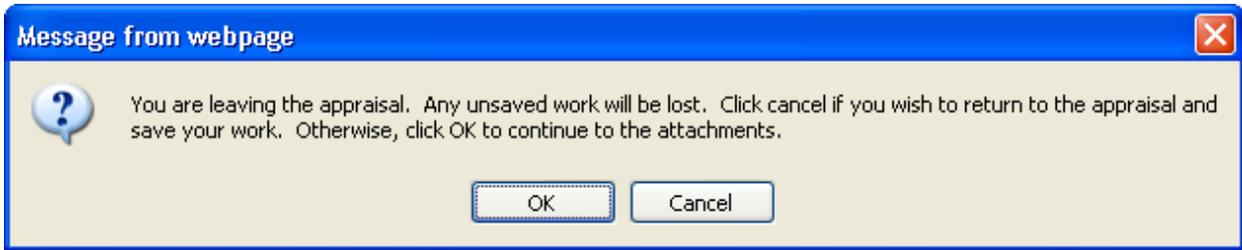
Clicking the "OK" button on the pop-up message displays the following page. The rater can add an attachment by using the "Browse" button, selecting the appropriate file, and then using the "Upload File" button. To remove an attachment from an appraisal, the Rater clicks on the "X" icon that appears to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

Print Preview

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.

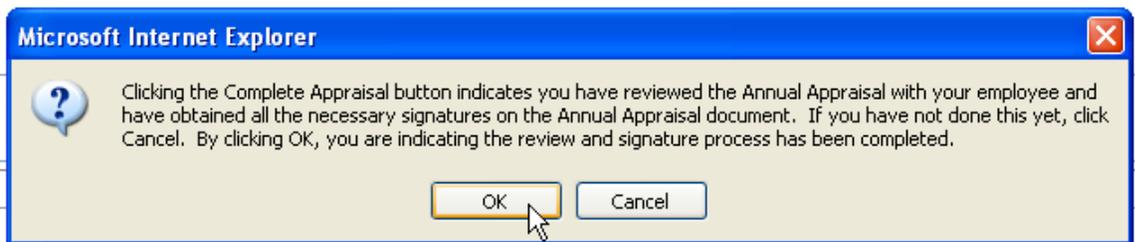Calculate Only | Save | Submit | Exempt & Submit | Complete Appraisal | Overturn Appraisal | Attachments | View Sticky Notes | Print Preview

Detail explanation about button functionality

Click this button to indicate the ratings have been communicated to the employee and the appraisal process is complete

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

Microsoft Internet Explorer

Clicking the Complete Appraisal button indicates you have reviewed the Annual Appraisal with your employee and have obtained all the necessary signatures on the Annual Appraisal document. If you have not done this yet, click Cancel. By clicking OK, you are indicating the review and signature process has been completed.

OK   Cancel

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