

## Creating Annual Appraisals (Ratings or Rating Exemptions)

From the Rater's Home Page in PERforM, he or she will click the Create New Appraisal link.

The screenshot shows the PERforM Home Page. At the top is a navigation bar with links: Home, My Employees, My Reviews, System Administration, My Agency Admins, Proxy, Reports, Online Help, and Log Out. Below the navigation bar is the 'Home Page' section. On the left, under 'Raters', there is a 'My Employee List' section with a link 'View My Current Employees'. Below that is a 'Performance Plans (Objectives)' section with a link 'Develop/Update Performance Objectives'. On the right, under 'Performance Appraisals (Ratings and Annual Rating Exemptions)', there is a list of links: 'Create New Appraisal', 'Update Incomplete Overturn Completed' (with a tooltip that says 'Allows you to create new appraisal documents for your employees.'), 'View Current Complete and Exempt Appraisals', 'View All Complete and Exempt Appraisals', 'View All Incomplete Appraisals', and 'Search Appraisals'.

This will take the Rater to a page listing the employees he or she supervises. The Rater will select the employee for whom an appraisal is to be created by clicking on the employee's name.

The screenshot shows the 'Employee List - Performance Appraisals' page. At the top, there is a banner with the PERforM logo and the text 'Productivity, Excellence and Results for Missouri'. Below the banner is a navigation bar with links: Home, My Employees, My Reviews, System Administration, Reports, Online Help, and Log Out. The page title is 'Employee List - Performance Appraisals' and it includes a link 'Who is required to have an annual appraisal?'. Below the title is a paragraph: 'You are responsible for supervising and appraising the following employees. (Click on any column heading to sort data by that column in ascending order.) Click on an employee's name to create a new performance appraisal. (2) total employees'. Below this is a table with the following data:

Employee Name	Title Code	Job Title	Organization Name	Supervisor	Annual Required
<a href="#">LEVY, KELLY ANN</a>	000493	TRAINING TECH III	PERS-STAFF	Yes	Yes
<a href="#">SCROGGINS, CYNTHIA</a>	000493	TRAINING TECH III	PERS-STAFF	Yes	Yes

The Rater will be taken to the Select Appraisal Type page to select the type of appraisal they want to create for the employee. The Rater will select Annual from the drop down box and click "OK."

The screenshot shows the 'Select New Appraisal Type' page. At the top, there is a banner with the PERforM logo and the text 'Productivity, Excellence and Results for Missouri'. Below the banner is a navigation bar with links: Home, My Employees, My Reviews, System Administration, Reports, Online Help, and Log Out. The page title is 'Select New Appraisal Type' and it includes a link 'How to Evaluate and Rate Employee Performance Objectives'. Below the title is a form with the following fields: 'Employee Name' (LEVY, KELLY ANN), 'Job Title' (TRAINING TECH III), 'Organization' (PERS-STAFF), and 'Supervisor' (Yes). Below the form is a 'Select New Appraisal Type' dropdown menu with 'Annual' selected. At the bottom of the form are 'OK', 'Cancel', and 'Enable Quick Scoring' buttons.

This action will take the Rater to the Create Performance Appraisal page.

The Missouri State Employee Online Performance Appraisal System  
**PERforM**  
 Productivity, Excellence and Results for Missouri

Thursday, May 24, 2007 11:43:53 AM Welcome - ALLAN FORBIS (BDS\Perform\_BDS) your role(s): [Admin](#) [Reviewer](#) [Rater](#)

[Home](#) [My Employees](#) [My Reviews](#) [System Administration](#) [Reports](#) [Online Help](#) [Log Out](#)

[Home Page](#) > [Select Employee - Performance Appraisals](#) > [Select Appraisal Type](#) > Create Performance Appraisal

**Create New Appraisal** [How to Evaluate and Rate Employee Performance Objectives](#)

Employee Details		Performance Objectives	
Employee Name	SCROGGINS, CYNTHIA	Job Title	TRAINING TECH III
Supervisor Name	FORBIS, ALLAN J.	CIVS Description	UCP MERIT SYSTEM CLASSIFIED
Agency	OFFICE ADMINISTRATION-OPER	Percentage Fulltime	1.0
Organization	PERS-STAFF	Months of Service	29.0 months

Performance Appraisal Details			
Appraisal Type	Annual	Rating Period	1/1/2007 - 4/30/2007
Appraisal Status	New	Appraisal Date	4/23/2007 2:22:36 PM
		Overall Score	-
		Overall Rating	-

**1. Knowledge of Work** Rating **2** ● 1 ● 2 ● 3 ● 4 ● 5 ● 6 ● 7 ● 8 ● 9 ● 10

Performance Objectives:

1. Seek and obtain necessary education to meet performance requirements.

Comments:

**3** CONDENSED SCREEN PRINT  
(Not all Performance Components are shown)

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**5. Dependability** Rating ● 1 ● 2 ● 3 ● 4 ● 5 ● 6 ● 7 ● 8 ● 9 ● 10

Performance Objectives:

1. Adhere to the agreed upon work schedule as part of the DIS Work Hours Policy.
2. Obtain prior approval for all annual leave.

Comments:

Overall Comments:

**4**

Appraisal Status: **In Progress** Overall Score Overall Rating

**5 1 6 7 8 9**

[Calculate Only](#) [Save](#) [Submit](#) [Exempt & Submit](#) [Attachments](#) [Print Preview](#)

[Detail explanation about button functionality](#) [Back to top](#)

Using the available buttons, the Rater can:

- 1 Assign "In Progress" status to the new appraisal and retain work.
- 2 Rate each performance component.
- 3 Enter comments about the employee's performance for each performance component.
- 4 Enter overall comments about the employee's performance during the appraisal period or provide an explanation for exemption if insufficient information exists to rate the employee.
- 5 Calculate the employee's overall score and performance rating.
- 6 Submit the Appraisal to the Reviewer for approval and change the status to "Pending."
- 7 Exempt the employee from the Annual Appraisal rating (in accordance with agency policy).
- 8 Attach a document to the Appraisal.
- 9 Print the Appraisal.

## Entering Written Comments on the Employee’s Appraisal

Written comments regarding the employee’s performance during the appraisal period may be entered on the Create Performance Appraisal page (or the Edit/Update Performance Appraisal page if the appraisal has already been created and saved), in the ‘Comments’ field for each performance component and the ‘Overall Comments’ field near the bottom of the page. To include comments, the Rater places his or her cursor in the appropriate text field and types their comments. The text is saved in PERforM each time the Rater saves the appraisal. The Rater can change the text in the fields as many times as desired. The amount of characters (letters and spaces combined) permitted in each field is listed below:

- Comments for Components – 500 Characters**
- Overall Comments – 1000 Characters**

In instances when an employee is given an exemption from receiving an annual rating, the Rater provides a justification for this action in the Overall Comments field.

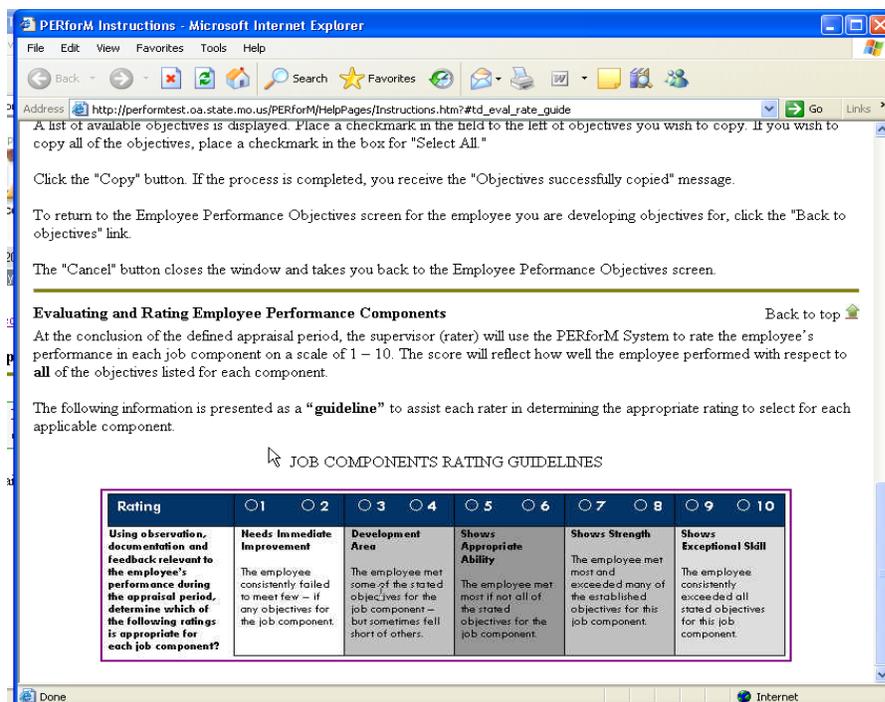
**Note:** Written comments can be added, modified and deleted until the time the appraisal has been approved; however, the appraisal must be resubmitted to the Reviewer.

## Scoring (Rating) Performance Components

On the Create Performance Appraisal page (or the Edit/Update Performance Appraisal page if the appraisal has already been created and saved), the Rater can indicate a score for each component by clicking next to the score they desire.



To review guidelines about scoring Performance Components, Raters can click the “How to Evaluate and Rate Employee Performance Components” link near the top of the page.



## Calculating the Results of Performance Component Scores

At the bottom of the Create Performance Appraisal page, there is a “Calculate” button to compute the employee’s overall score and populate the ‘Overall Rating’ field. The score and overall rating is displayed at the bottom of the appraisal.



The screenshot shows a horizontal bar with three labels: *Appraisal Status*, *Overall Score*, and *Overall Rating*. Below this bar is a row of buttons: **Calculate Only**, **Save**, **Submit**, **Exempt & Submit**, **Attachments**, and **Print Preview**. To the right of these buttons is a green upward-pointing arrow icon with the text **Back to top**. Below the buttons is a blue link: [Detail explanation about button functionality](#).

## Enabling “Quick Scoring”

If the Rater elects to do so, he or she can enable Quick Scoring of the appraisal by clicking the “Enable Quick Scoring” box and the “OK” button on the Select Appraisal Type page.



The screenshot shows the top of the PERforM system interface. It includes the logo 'PERforM' with the tagline 'Productivity, Excellence and Results for Missouri' and the Missouri State Seal. Below the logo is a navigation bar with the date 'Thursday, May 24, 2007 11:52:38 AM' and the user information 'Welcome - ALLAN FORBIS (BDS\Perform\_BDS) your role(s): Admin Reviewer Rater'. The navigation bar contains links for Home, My Employees, My Reviews, System Administration, Reports, Online Help, and Log Out. Below the navigation bar is a breadcrumb trail: [Home Page](#) > [Select Employee - Performance Appraisals](#) > [Select Appraisal Type](#). The main heading is **Select New Appraisal Type**, with a link [How to Evaluate and Rate Employee Performance Objectives](#) to the right. Below the heading is a form with the following fields: *Employee Name* SCROGGINS, CYNTHIA; *Job Title* TRAINING TECH III; *Organization* PERS-STAFF; and *Supervisor* Yes. Below these fields is a dropdown menu for 'Select New Appraisal Type' set to 'Annual'. At the bottom of the form are three buttons: **OK** (with a mouse cursor over it), **Cancel**, and  **Enable Quick Scoring**.

This action will condense the appraisal so that only the rating or scoring feature of each Performance Component is displayed. The performance objectives and comments field for each component will not be visible.

The following screen print shows what the open appraisal will look like with Quick Scoring on:

The Missouri State Employee Online Performance Appraisal System

# PERforM

Productivity, Excellence and Results for Missouri





Monday, September 15, 2008 1:37:40 PM Welcome - SAM SAMPLE (BDS LuebbM1) your role(s): [Reviewer Rater](#)

[Home](#)   [My Employees](#)   [My Reviews](#)   [Reports](#)   [Online Help](#)   [Log Out](#)

[Home Page](#) > [Select Employee - Performance Appraisals](#) > [Select Appraisal Type](#) > Create Performance Appraisal

**Create New Appraisal** [How to Evaluate and Rate Employee Performance Components](#)

**Your PERforM session will time out after 30 minutes. To refresh (extend) your session, please save the appraisal often by using the Save button located at the bottom of the page.**

Employee Details		<a href="#">Performance Objectives</a>	
Employee Name	CLEVER, KATHY A	Job Title	SPECIAL ASST TECHNICIAN
Supervisor Name	SAMPLE, SAM S	CIVS Description	UCP MERIT SYSTEM UNCLASSIFIED
Agency	OFFICE ADMINISTRATION-OPER	Percentage Fulltime	1.0000
Organization	MENTAL HEALTH	Months of Service	73.0 months

Performance Appraisal Details			
Appraisal Type	Annual	Rating Period	1/1/2008 - 12/31/2008
Appraisal Status	<a href="#">New</a>	Last Updated Date	9/15/2008 1:37:37 PM
Appraisal Start Period	01/01/2007	Appraisal End Period	12/31/2007

<b>1. Knowledge of Work</b>	Rating	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9 <input type="radio"/> 10
<b>2. Quality of Work</b>	Rating	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9 <input type="radio"/> 10
<b>3. Situational Responsiveness</b>	Rating	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9 <input type="radio"/> 10
<b>4. Initiative</b>	Rating	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9 <input type="radio"/> 10
<b>5. Dependability</b>	Rating	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9 <input type="radio"/> 10

**Overall Comments:**

Calculate Only
Save
Submit
Exempt & Submit
Attachments
Print Preview

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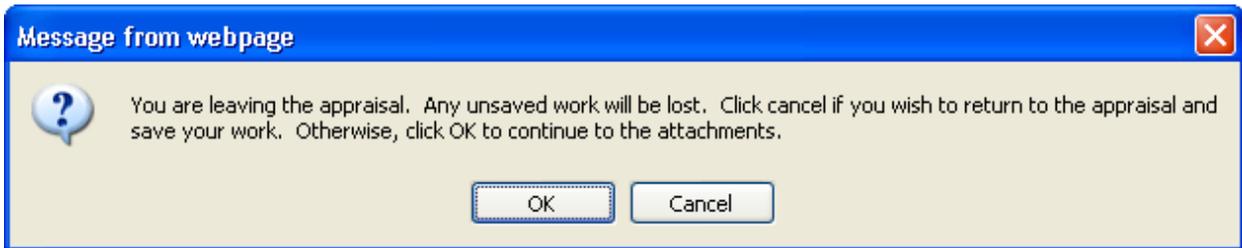
[Detail explanation about button functionality](#)

## Using PERforM's Attachment Feature

The Rater can attach a document to the appraisal in PERforM once the appraisal has been saved for the first time. To include an attachment, the rater clicks the "Attachment" button on the bottom of the Create Performance Appraisal page.

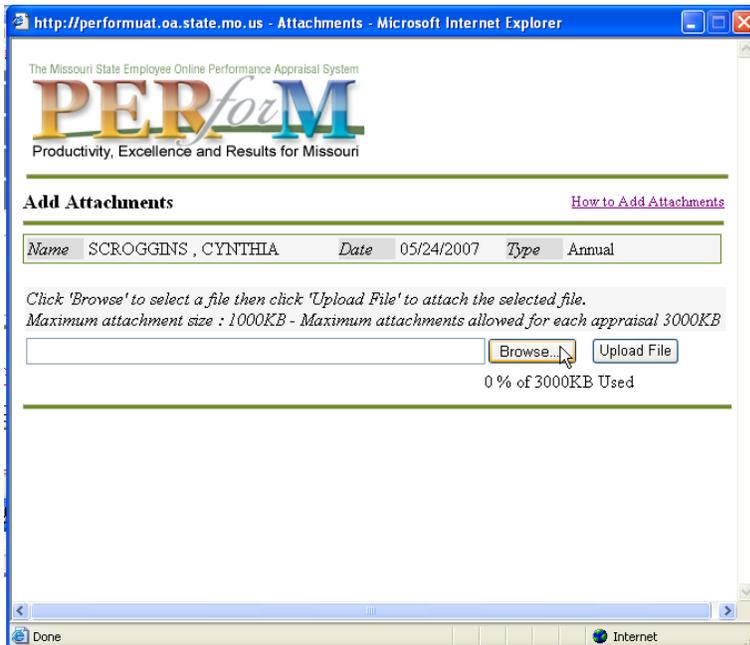


NOTE: When the Rater clicks the "Attachment" button, the following pop-up message will appear.

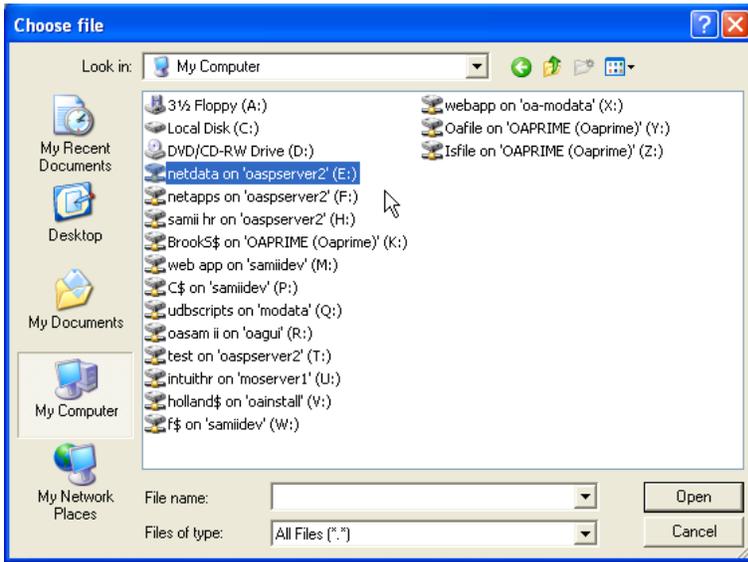


If the Rater has not saved shanges changes to the appriaisl, he/she should click "Cancel" to return to the appraisal and then "Save" changes to the appraisal. If changes have already been saved, the Rater should click "OK" to proceed to the "Add Attachments" window.

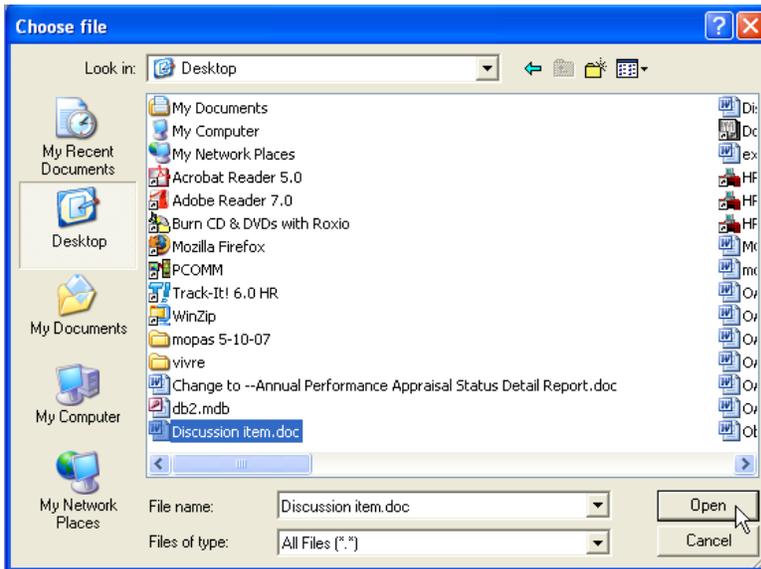
A new page will appear prompting the Rater to select a document to attach.



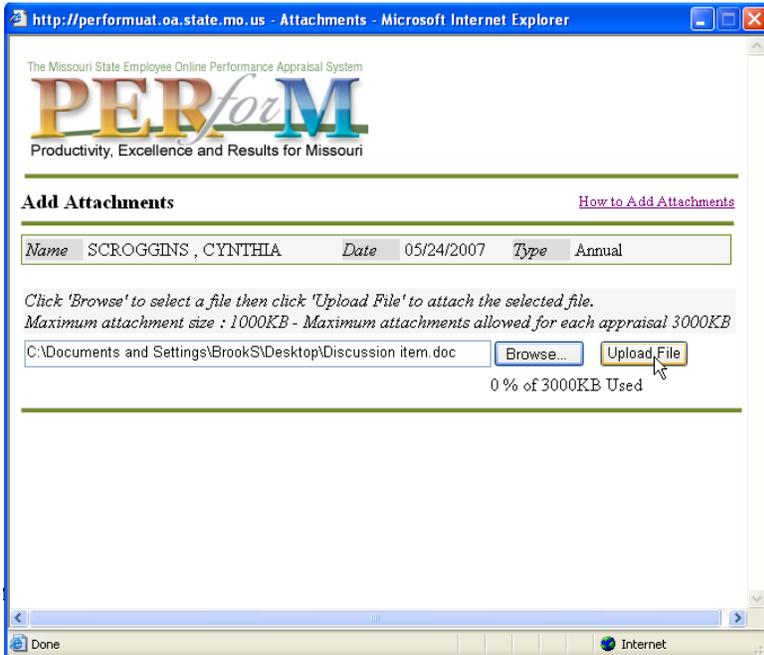
When the Rater clicks the browse button, he or she can select items from their own pc or the network to attach.



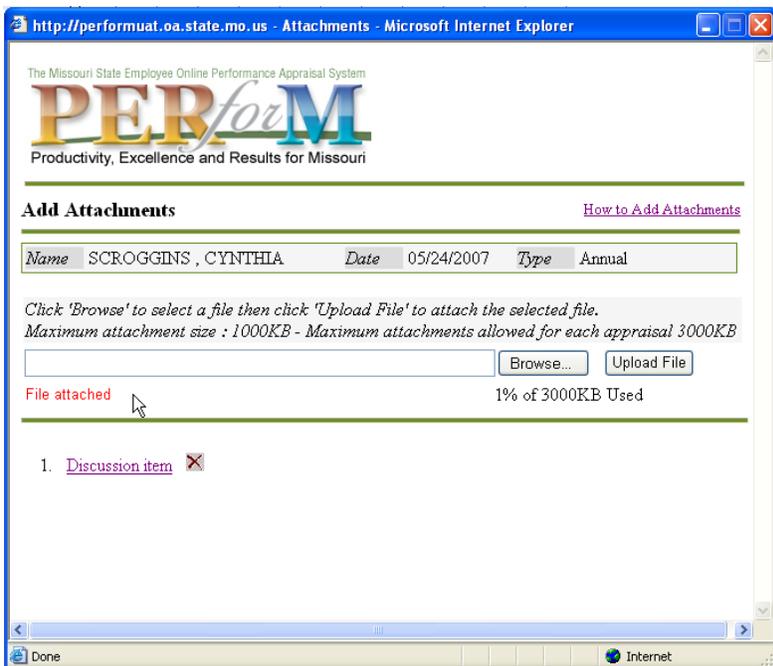
Once the Rater locates and selects the correct file to attach, he or she will click the “Open” button.



The file will then be selected in the browse drop-down and the Rater will click the upload file button to complete the process.



A message will be displayed that the file has been attached.



## Routing the Appraisal to the Reviewer for Approval

All appraisals (ratings and rating exemptions) are “routed” to the Reviewer by clicking the “Submit” button or “Exempt & Submit” button on the bottom of the Create Performance Appraisal or the Edit/Update Performance Appraisal page. A message confirming the action was successful will be displayed and the appraisal status will change to either “Pending” or “Exempt Pending.”

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Appraisal has been submitted to the Reviewer for approval.

[Calculate Only](#) [Save](#) [Submit](#) [Exempt & Submit](#) [Attachments](#) [Print Preview](#)

[Detail explanation about button function](#)

Click this button to send the performance appraisal to the Reviewer for required action.

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