

Performance Appraisal Form Instructions

Last Updated on July 20, 2021

Location

1. Office of Human Resources & Compliance Website → Supervisors → Forms
(<https://www.messiah.edu/info/20589/supervisors/1012/forms>)
 - a. Includes live form, instructions and a sample PDF of the full appraisal form

Employees Utilizing Form

1. All administrative and staff employees

Form Sections

1. Instructions & Employee/Supervisor Information Page
2. Supervisor Ratings
3. Employee Ratings
4. Employee/Supervisor Summary
5. Professional Development Plan

Form Items

1. Initiating the Performance Appraisal Form
 - a. Appraisal forms must be launched by the Supervisor as the Supervisor is asked to complete a number of appraisal questions upon initiating the form.
 - b. ***It is critical that the Employee and Supervisor's e-mail address are entered correctly*** as this information is used for form routing. If uncertain of the e-mail address, please use the Microsoft Outlook "Search People" box to look up the e-mail address.
2. Modifying Previously-Completed Fields
 - a. Fields are editable only by one user and only at one workflow step. Fields are no longer editable on forms that have been submitted to the next workflow step
3. Save Progress & Retrieving Saved Forms
 - a. Users have 45 minutes upon accessing the form to complete the form. Users are able to use the "Save Progress" button to save work during the completion process. The "Save Progress" button is also helpful if the user needs to leave and return to complete the form at a later time.

Appraisal Due Date * 05/24/2021

Employee Information
The following information will be used to route this form to your employee. Please double check that the information is correct.

First Name * DonaldEmployee Last Name * Lerew Email Address * dlerew@messiah.edu

Position Title * HRIS & Payroll Manager

Position in VP for Operations Area * Yes No

* Supervisor has reviewed and, if necessary, updated the position description in PeopleAdmin.
* Supervisor has provided the position description to the employee

Supervisor Information
The following information will be used to route this form back to the supervisor. Please double check that the information is correct.

First Name * DonaldSupervisor Last Name * Lerew Email Address * dlerew@messiah.edu

Next-Level Approver Information [OPTIONAL-Only in areas where supervisors need approval before routing to supervisee]
Does review need to be approved before routing to employee? * Yes No

First Name * DonaldApprover Last Name * Lerew E-mail Address * dlerew@messiah.edu

- b. To access saved forms after timeout or logout, go to FalconLink > Dynamic Forms and select “My Forms” | “Pending Draft Forms”. Then select “Complete Form” from the Action drop-down menu.

FalconLink Dynamic Forms - a Next Gen W... Application Navigator Profile

https://dynamicforms.ngwebsolutions.com/AdminPortal

Messiah University - Human Resources

My Forms Admin

Pending / Draft Forms Forms History

Form Templates 4

FalconLink Dynamic Forms - a Next Gen W... Job Info

https://dynamicforms.ngwebsolutions.com/UserDashboard/PendingForms

Messiah University - Human Resources

My Forms Admin

Pending / Draft Forms

Form Name	Status	Description	Date	PDF	HTML	Action
Performance Appraisal Form 2021	Draft	Started By: Donald Lerew	Last Saved: 6/25/2021 7:19:25 AM	<input type="checkbox"/>	<input type="checkbox"/>	Action Complete Form Delete
Performance Appraisal Form 2021	Incomplete	Started By: Donald Lerew	Signature Request Date: 6/9/2021 2:19:13 PM	<input type="checkbox"/>	<input type="checkbox"/>	
Performance Appraisal Form 2021	Pending	Started By: Donald Lerew	Signature Request Date: 6/9/2021 2:19:13 PM	<input type="checkbox"/>	<input type="checkbox"/>	Action

4. Returning for Revision

- a. When a form is at a specific user's step in the workflow, the user is given a "Return for Revision" option. The user may use this option to return the form to a prior step in the workflow. The user will be prompted with an e-mail prompt box to type an e-mail notification that will be routed to the user to whom the form is routed.

Appraisal Due Date * 05/24/2021

Employee Information
The following information will be used to route this form to your employee. Please double check that the information is correct.

First Name * DonaldEmployee Last Name * Lerew Email Address * dlerew@messiah.edu

Position Title * HRIS & Payroll Manager

Position in VP for Operations Area *
 Yes
 No

* Supervisor has reviewed and, if necessary, updated the position description in PeopleAdmin.
* Supervisor has provided the position description to the employee

Supervisor Information
The following information will be used to route this form back to the supervisor. Please double check that the information is correct.

First Name * DonaldSupervisor Last Name * Lerew Email Address * dlerew@messiah.edu

Next-Level Approver Information [OPTIONAL-Only in areas where supervisors need approval before routing to supervisee]
Does review need to be approved before routing to employee? *
 Yes
 No

First Name * DonaldApprover Last Name * Lerew E-mail Address * dlerew@messiah.edu

Save Progress | **Return for Revision** | Next

Return For Revision
This form will be returned for revision. Please enter the content of the email that will be sent to the previous form participant(s) to prompt them to review and/or re-submit the form.

To
Donald Lerew (dlerew@messiah.edu)

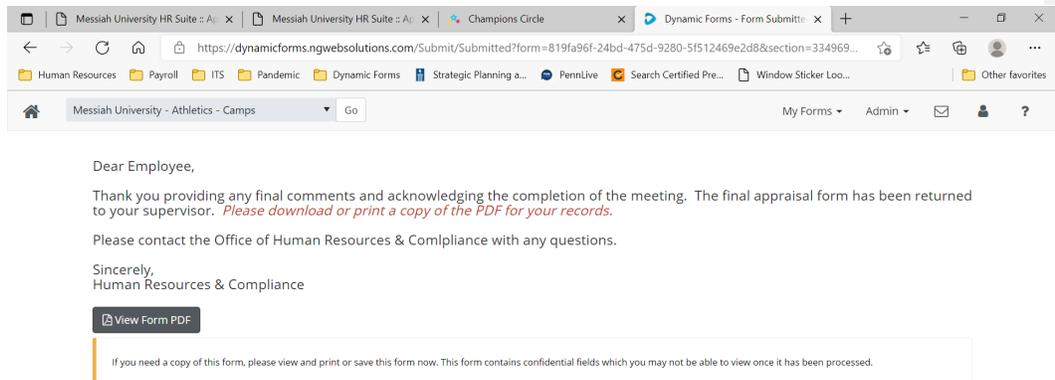
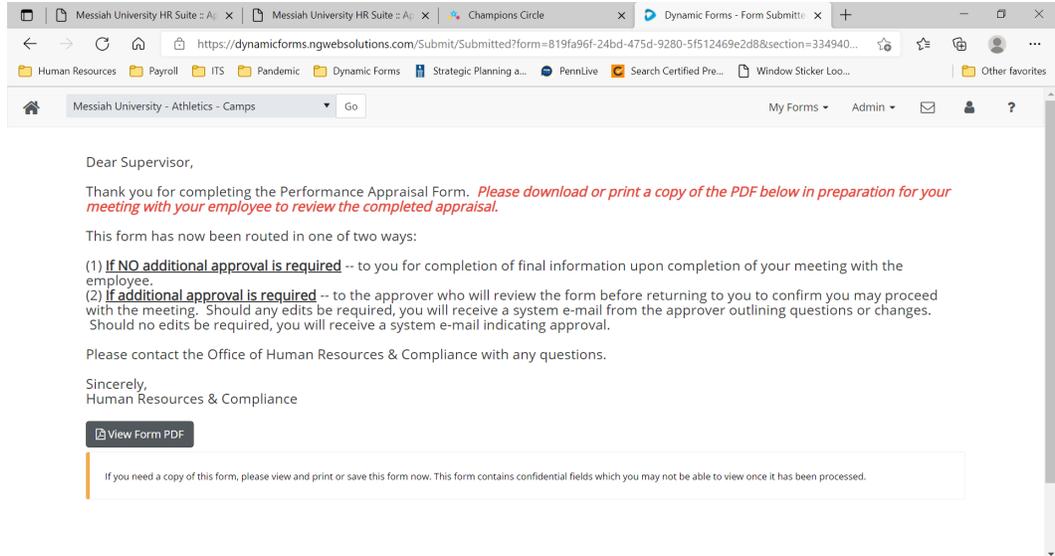
Subject

Body

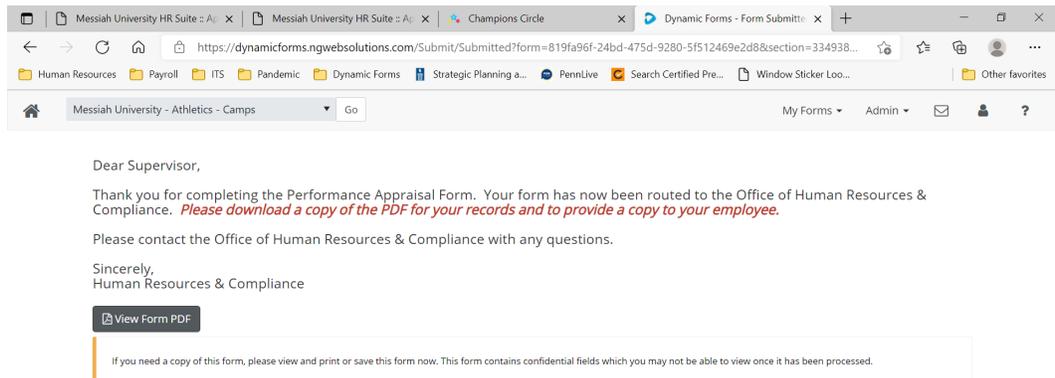
Rich text editor toolbar with options for Source, Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Undo, Redo, Styles, Format, Font, Size, and a link icon.

5. Copies of In-Progress and Completed Forms

- a. At each signature step, a “View Form PDF” link is available from the system submission confirmation page to view, print or download.



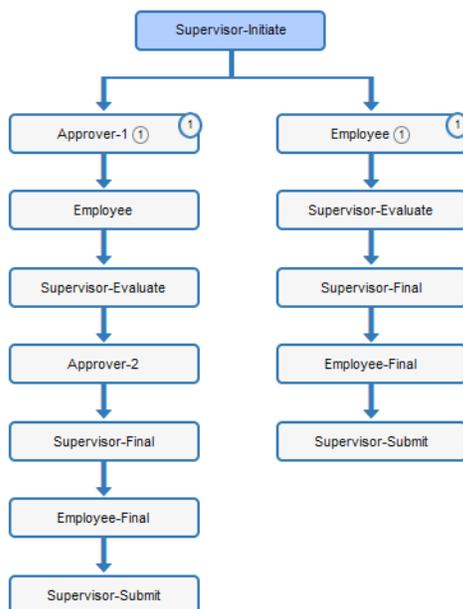
- b. When a document is fully completed and submitted by the supervisor to Human Resources, the supervisor must download a copy via the “View Forms PDF” on the submission confirmation page as it will not be accessible after this step.



- c. Should the employee or supervisor fail to download the form via the “View Form PDF” button on the submission confirmation page, please contact Human Resources & Compliance at humanres@messiah.edu to request a copy.
- 6. Providing Copies to Other Employees
 - a. Only individuals identified in the workflow who are required to review/complete sections of the form may access the form via the system. If there is a need to share with any other users, the form should be downloaded to PDF to send.
- 7. Proxy Access
 - a. At this time, only the supervisor and the employee have access to complete and route the appraisal form through the completion and approval process.
- 8. Document Retention
 - a. Performance Appraisal Forms are currently maintained in the system for a period of 6 years. Employees and Supervisors should download the PDF of the completed appraisal form to retain a permanent copy for their records.

Form Workflow

1. Step 1: Supervisor-Initiate
2. Step 1.1 [OPTIONAL]: Approver-1 {no longer to be used}
3. Step 2: Employee
4. Step 3: Supervisor-Evaluate
5. Step 3.1 [OPTIONAL]: Approver-2 {no longer to be used}
6. Step 4 [OFFLINE]: Supervisor/Employee Meeting
7. Step 5: Supervisor-Final
8. Step 6: Employee Final
9. Step 7: Supervisor-Submit
10. Step 8: Human Resources notified of completed form



Form Workflow Details

1. STEP #1 [Supervisor-Initiate]: The supervisor initiates the Appraisal Form and completes the name and e-mail of both the Employee and Supervisor for routing. For select areas requiring higher-level approval of the Appraisal Form before routing to the Employee, the Supervisor will provide the name of the Approver as well. Supervisors will complete the supervisor ratings section. Upon submission, the Appraisal Form will be routed as follows:
 - a. **If NO additional approval is required** -- to the Employee for completion
 - b. **If additional approval is required** -- to the Approver who will review the Appraisal Form before routing to the Employee. Should any edits be required, the Supervisor will receive a system e-mail from the Approver. Should no edits be required, the Approver will submit the Appraisal Form directly to the Employee.
2. STEP #2 [Employee]: The Employee will complete all evaluation items available to them for the evaluation. The Employee will NOT be able to view the supervisor entries. Please submit, upon completion, to route to the Supervisor.
3. STEP #3 [Supervisor-Evaluate]: The Supervisor will complete all remaining evaluation items. Upon submission, please print/save the PDF available on the confirmation page in preparation for the Supervisor/Employee meeting. Once submitted, the form will be routed in one of two ways:
 - a. **If NO additional approval is required** – returned to the Supervisor for completion of final post-Supervisor/Employee meeting evaluation items.
 - b. **If additional approval is required** -- to the Approver who will review the form before returning to the Supervisor to confirm the Supervisor may proceed with the meeting. Should any edits be required, the Supervisor will receive a system e-mail from the Approver outlining questions or changes. Should no edits be required, the Supervisor will receive a system e-mail indicating approval.
4. STEP #4: The Supervisor will schedule and conduct a meeting to review the completed appraisal with the Employee.
5. STEP #5 [Supervisor-Final]: The Supervisor will complete post-meeting appraisal items and submit to the employee for final signature.
6. STEP #6 [Employee-Final]: The Employee will complete post-meeting appraisal items and submit the final appraisal to the supervisor. The Employee should print/save a copy of the final PDF appraisal form for their records.
7. STEP #7 [Supervisor-Submit]: The Supervisor will sign and submit the electronic appraisal to route to Human Resources. The Supervisor should print/save a copy of the PDF for their records.