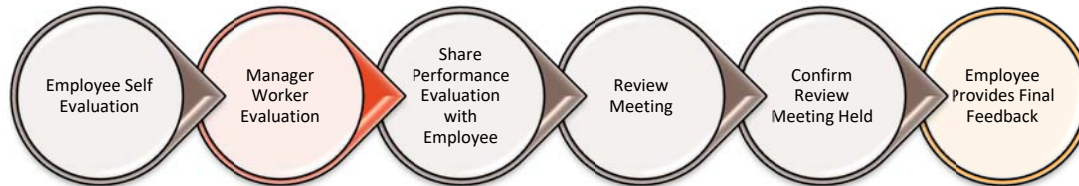


This document is designed to guide you through the steps you will take within the new performance evaluation system as a manager.

Overall Process:



Navigation:

1. Login

a. Access the Talent system: <https://sabhrsi.mt.gov/>

i. Click the **Talent** button

b. Login:

i. The first time you log in, use the below username/password:

Username = **your employee ID number** (6-digit number on your badge, not c#)

Password = **your last name (lowercase) + last 4 digits of your SSN** (example: *murphy1234*)

**If the default login does not work for you, please email talent@mt.gov to have your password reset.*

2. Click the **My Team** icon.



3. Click the **Performance** icon.



4. Locate the employee you wish to evaluate.

You may need to click "load more" (bottom of the page) if you have more than five (5) employees.

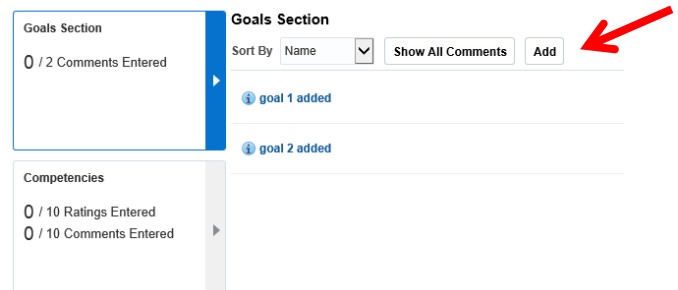
5. Under 'My Next Task', click **Manager Evaluation of Workers**.



Goal Section:

In this section, you will see how to enter the goals to evaluate an employee on and then how to comment on each goal you entered. The employee may have added their own goals during self-evaluation. If you entered goals within the goals area, you should see them displayed here.

1. The Goals Section box will be highlighted in blue. Click the **Add** button to add a goal.



- You'll get a popup box to enter the goal. Fill in at least the **Goal Name** and **Description** then click **Save and Close**.

Add Performance Goal

New goal Add from goal library

* Goal Plan Name 2016 Goal Plan 1/1/16 - 12/31/16

Goal Name

Description

Priority

* Start Date

Target Completion Date

Status

Completion Percentage

Repeat until all goals are entered.

- Commenting on goals: There are a few ways to do this:
 - Click **Show All Comments** to quickly provide ratings and comments on each, OR
 - Click on the goal name in blue (*recommended as this allows you to review the goal information*), OR
 - Click the rating dropdown and comment icon to the right of the goal name.

The screenshot shows a 'Goals' sidebar with '0 / 1 Ratings Entered' and '0 / 1 Comments Entered'. The main area has a 'Goals' header with a 'Sort By' dropdown set to 'Name' and a 'Show All Comments' button. A list of goals is shown, with one goal named 'test' highlighted in blue. Callouts point to:

- The 'Show All Comments' button: 'click here to view/edit the comments fields'
- The blue goal name 'test': 'click here to open the goal full screen view'
- The goal name 'test' (in a different callout): 'click here to view the goal description and rating descriptions'
- A rating dropdown menu: 'select a rating from the dropdown'

*It's a good idea to click **Save** at the top of the page often so you don't risk losing any work.*

Once you have rated and commented on every goal, you are ready to move to the competency section.

Competency Section:

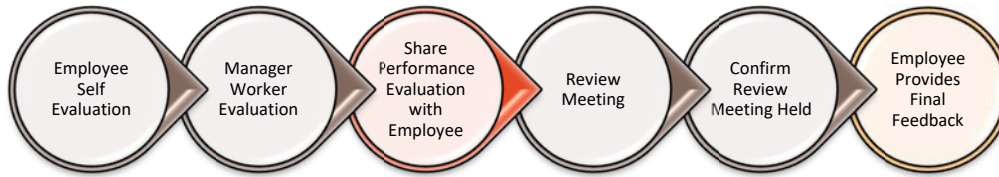
In this section you will rate each competency and provide feedback in the manager comments box.

1. Click the arrow icon in the Competencies box to open the competency view.

In the competency, full-screen view:

2. Click the Information icon to review the rating criteria.
3. Review the competency description.
4. Provide rating from the dropdown.
5. Enter comments in the comments field.

6. Click the **Arrow** icon to scroll to the next competency.
7. When finished entering ratings and comments for each competency, click **Done**.
*It's a good idea to click **Save** at the top of the page often so you don't risk of losing any work.*
8. When you are satisfied with the evaluation, click **Submit** at the top of the page.
9. You will be directed back to the main screen where you will see the next task **Share Performance Document**

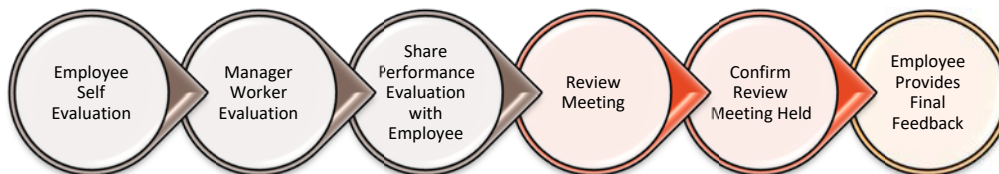


Share Performance Evaluation with Employee

Now that the you have completed the evaluation of the worker its time to share it with the them.

1. Navigate back to the employee you wish to release the evaluation to, you will see the next task is **Share Performance Document**
2. Click **Share and Release** at the top of the page
 - a. Enter a personal comment in the pop up box and click **OK**.
**Optional, this comment will display in the email notification to the employee*
 - b. You will receive a pop up box as confirmation that you shared the evaluation, click **OK**.

The employee will receive an email letting them know the evaluation is available for review.



Confirm Review Meeting:

1. Once the review meeting has been held you will need to confirm that it was held and provide the date of the meeting.
2. Login and navigate to the employee you wish to confirm the review meeting for, click the next task: **Confirm Review Meeting Held**.
3. Enter the date the review meeting was held and click **OK**.

At this point your employee will receive a notification to confirm the review meeting and provide final feedback. Once the employee has completed the final feedback step, The evaluation process will be complete.