

Guide for Second Level Managers

If you are a second level manager, you may have anywhere from one to many indirect reports. Given that a second level approval is required as part of the annual performance appraisal process, it may be time-consuming for you. This guide is intended to help you understand the expectations of you as a second level approver and how to use reports in myPerformance to make this task efficient and productive.

Second Level Approver Expectations

Rating annual performance can be a difficult task for even the best manager. As a second level manager, you are expected to work with your direct reports in reaching similar definitions of the rating scale, which increases fairness of the process. The below steps outline how you can use score data to help you with this responsibility.

Analyzing a Report

There are many ways to analyze a score report. The approach below is one way to get to know the scores in your unit and to understand where you need to ask more questions, even if you don't know all of your indirect reports. For a step-by-step guide for generating a score report, refer to the Appendix.

To get a feel for the data, look at the overall chart as well as each chart by manager.

As you review, ask yourself the following questions:

- What does the overall distribution look like? Does that distribution corroborate the results your unit accomplished in the past year?
- What do the score distributions by each manager look like? Does it appear that one manager is a more difficult or lenient rater than other managers?
- Look at the employees that have similar scores. When considering the results those employees accomplished, does that grouping make sense? To look at the data this way, scroll down past the charts and sort the data by employee score:

- Click the down arrow next to *By Overall Score* 
- Choose *No Grouping*
- Hold your mouse over the *Overall Score* column name, click the down arrow, and then choose *Sort Ascending* or *Sort Descending*



Overall Score Distribution for all direct and indirect reports

Score Distribution by Each Manager

Reviewing and Approving Appraisals

Once you have reviewed appraisal scores and discussed any changes with managers, the next step in the process is to review and approve each employee appraisal. While you can't review and approve all of the appraisals at once, reviewing appraisal scores beforehand using the Score Report will make the review process much more efficient.

To approve a manager's appraisal, click on *Review appraisals for second level reports* on the home page, and then click *Review and Approve*.

Home My Performance My Employees Task Status Reports

Welcome Shannon Marie Linhares. You are currently logged in as Nancy halogenSecondlevel Feedback

My Tasks (You have tasks to do)

| Status | Task | General Timeline | Completed |
|--|--|------------------|-----------|
| My Evaluation: Test Process FY15 Annual Appraisal Status | | | |
| | Write your self-appraisal | 4/17/15 | N/A |
| Test Process FY15 Annual Appraisal Status | | | |
| | Write appraisals for your employees (1 To-Do) | 5/15/15 | 0 of 1 |
| | Review appraisals for second level reports (2 To-Dos) | 5/29/15 | 0 of 2 |

Home My Performance My Employees Task Status Reports HALOGEN SOFTWARE

Test Process FY15 Annual Appraisal Viewing: Test Process FY15 Annual Appraisal

Tasks Overview

4/17/15 Employee writes self-appraisal 5/15/15 Write appraisals for your employees 5/15/15 Additional feedback 5/29/15 Review appraisals for second level reports 6/19/15 Meet and discuss appraisal with the employee 6/26/15 Employee final comment and sign-off 6/26/15 Sign-off appraisals for employee

1 To-Do 2 To-Dos 1 Not Ready 1 Not Ready 1 Not Ready

Search First and/or Last Name Search Show All Advanced Search

Appraisal Tasks

| First Name | Last Name | Review appraisals for second level reports | Appraisal Status | General Timeline | Completed Date | Employee writes self-appraisal | Evaluator |
|------------|-----------------|--|------------------|------------------|----------------|--------------------------------|-----------------------|
| Natasha | halogenEmployee | Review & Approve | View Status | 5/29/15 | | View Self-Appraisal | Nathan halogenManager |
| Norman | halogenEmployee | Review & Approve | View Status | 5/29/15 | | View Self-Appraisal | Nathan halogenManager |

You can review the appraisal, including the both manager and employee ratings and comments. If you approve the appraisal, click *Approve* at the top right hand corner. To quickly move on to the next employee, click *Next Employee* at the top right hand corner.

Review appraisals for second level reports Help

Natasha halogenEmployee Next Employee

Test Process FY15 Annual Appraisal
By Nathan halogenManager

Form Navigator Save for Now Send Back to Author Approve

myPerformance
Employee Performance Appraisal FY15

Demographics

Name: Natasha halogenEmployee Employee ID:
Job Title: Director of Support Supervisor: Nathanmanager
Department:

General Instructions

The annual Performance Appraisal is intended to a) summarize employee performance over the past year, and b) provide an employee and evaluator an opportunity to discuss performance and future development. Two sections of the form count toward the employee's overall rating: Success Factors and Key Responsibilities. The rating scale definitions, provided below, can help the evaluator accurately document an employee's performance. The comment boxes should be used to indicate specific examples that support the rating. If a rating of "Outstanding" or "Unacceptable" is given, a comment must be

If more work needs to be done on the appraisal, you can indicate your thoughts using the Annotation button, and then click *Send Back to Author*. Doing so will send the appraisal back to the manager to edit; once it is complete, it will go back to you for approval.

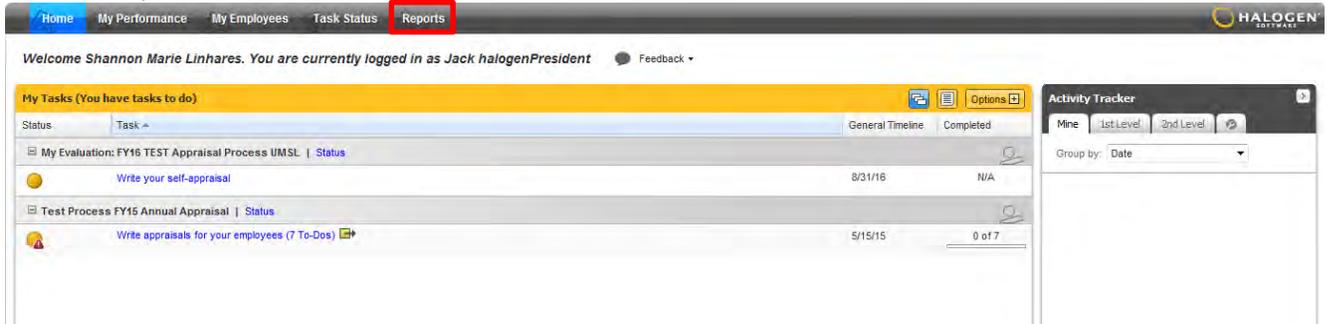
For more information on the appraisal process overall, check out the Performance Appraisal Process [video](#).

Appendix

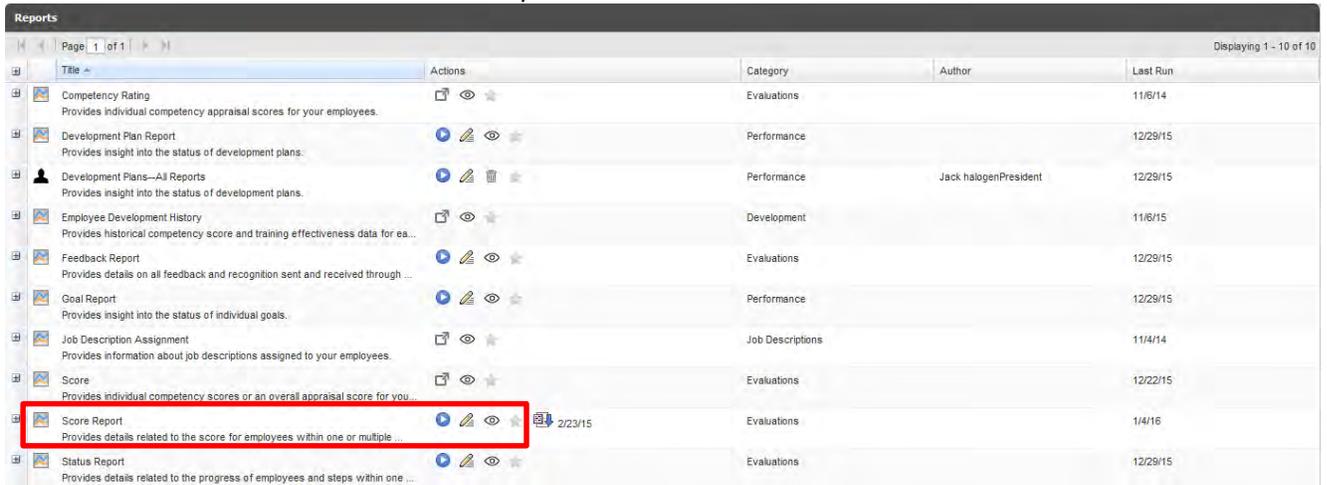
Steps for generating a score report are below. For more on reporting, check out the Reporting for Managers in myPerformance [video](#).

Generating a Report

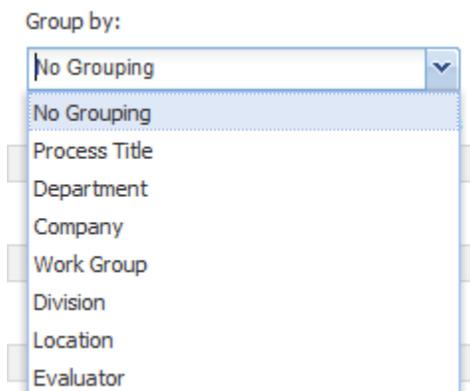
1. Log in to myPerformance
2. Click the *Reports* tab



3. Click the blue circle  next to the *Score Report*



4. Under *Group by*, choose *Evaluator*



5. Ensure the filters are correct
 - a. Delete the following filters by holding your mouse over the title of the filter and clicking the X symbol:
 - i. *Employee Scope (removing this ensures that your report will include all direct and indirect reports)*
 - ii. *Process Status (this filter is not needed if you add the Process Title filter discussed below)*
 - iii. *Subject Completed Status (removing this filter ensures that your report will include scores of employees that haven't completed the full process)*
 - b. Add the *Process Title* by clicking *Add Filters*, *Process Title*, and then choose the name of the current process. For example, if it is Fiscal Year 2016, you would choose the FY16 Appraisal Process
6. Click the blue circle  to regenerate the report with the correct filters.

[Add Filters](#)

Employee Scope

Direct Reports

Process Status

Open

Status

Active

Subject Completed Status

Yes