

LEADER APPRAISALS

Leader appraisals for performance period January 1, 2023 to December 31, 2023 will be available in Infor. Leaders will complete a self-appraisal. Their one-up leader will also complete and review an appraisal for the leader. The appraisal includes three sections: job description review, professional development plan, and goals. Leader appraisals must be completed and acknowledged in Infor by March 1, 2024.

Leader appraisal process:

- 1) When the appraisal process opens, all leaders eligible to receive or complete a leader appraisal will receive an automated Infor email to complete his/her/their self-appraisal or leader appraisal.
- 2) Leader completes submits self-appraisal to one-up leader.
 - a. Upon successful completion, an automated Infor email will be sent to the one-up leader indicating the self-appraisal is completed.
- 3) One-up leader completes appraisal form, viewing the completed self-appraisal embedded in the form.
- 4) The one-up leader meets with the leader to discuss the appraisal.
- 5) One-up leader submits the appraisal, entering the appraisal meeting date.
- 6) One-up leader submits to the leader for acknowledgment, allowing the leader to sign off on the appraisal.
 - a. An automated Infor email is sent to the leader notifying of the need to sign off electronically on the appraisal.
- 7) Leader acknowledges appraisal. Appraisal is complete.

LEADER SELF-APPRAISAL

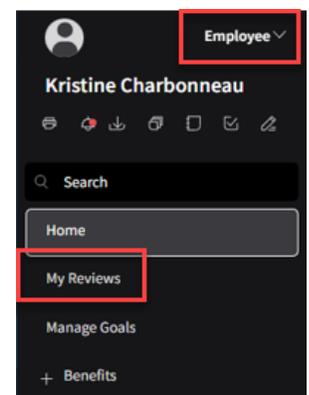
LEADER SELF-APPRAISAL

If you are in a leadership role in the organization, you will have a self-appraisal to complete. You will receive email notification to complete your self-appraisal.

To access Infor, double-click the **Infor ESS icon** on your desktop and use **two-factor authentication** with your mobile device.

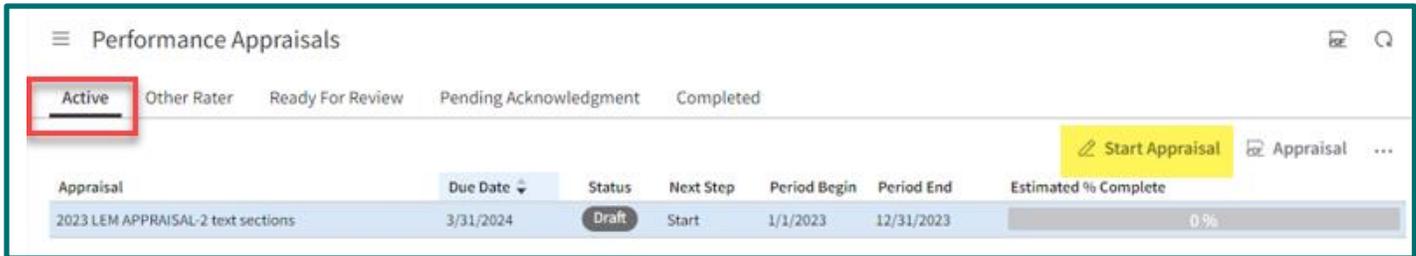


You are brought to the Employee Self Service home page. On the left-hand sidebar menu, click **My Reviews**.



After selecting My Reviews, the **Performance Appraisals** page displays beginning on the **Active** tab. The active **Leader Self-Appraisal** will display.

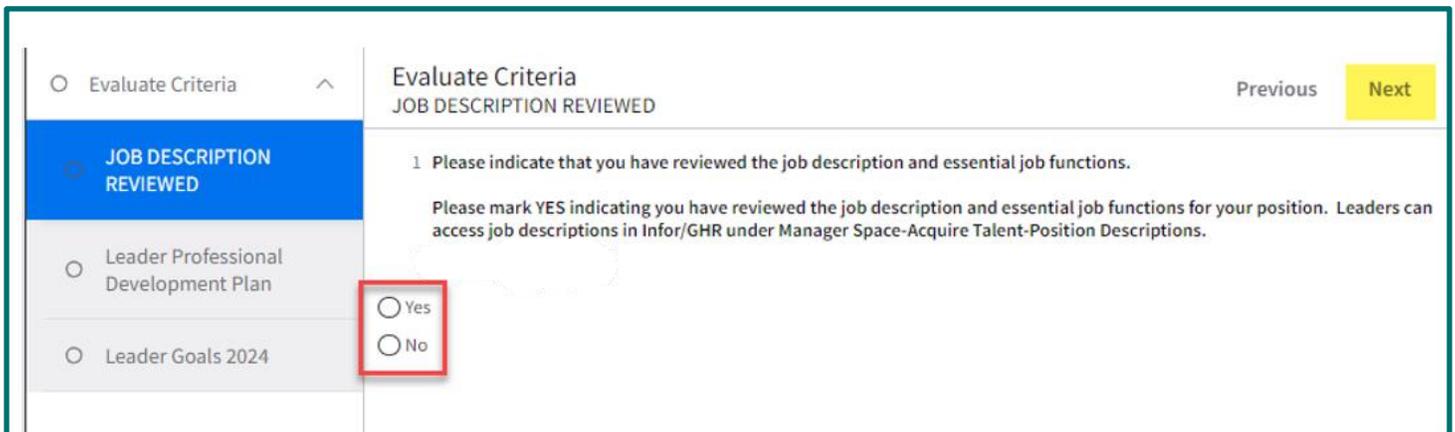
To begin the self-appraisal, verify you are selected on the appraisal, and click **Start Appraisal**.



There are three sections within the self-appraisal to complete.

The first section is: **Job Description Reviewed**. Read the text and indicate **Yes or No** as your answer choice.

Once you have completed this section, click **Next** in the upper-right corner.



The second section is: **Leader Professional Development Plan**. Read the text and **type your response** in the text box.

Once you have completed this section, click **Next** in the upper-right corner.

Evaluate Criteria Previous Next

Leader Professional Development Plan

1 Use this text box to describe opportunities for professional development and continued growth as a leader.

Normal Text | B | I | U | S | A | [List Icons] | [Link Icon] | [More Icon]

The third section is: **Leader Goals 2024**. Read the text and **type your response** in the text box.

Once you have completed this section, click **Save And Close** in the upper-right corner.

Evaluate Criteria Previous Save And Close

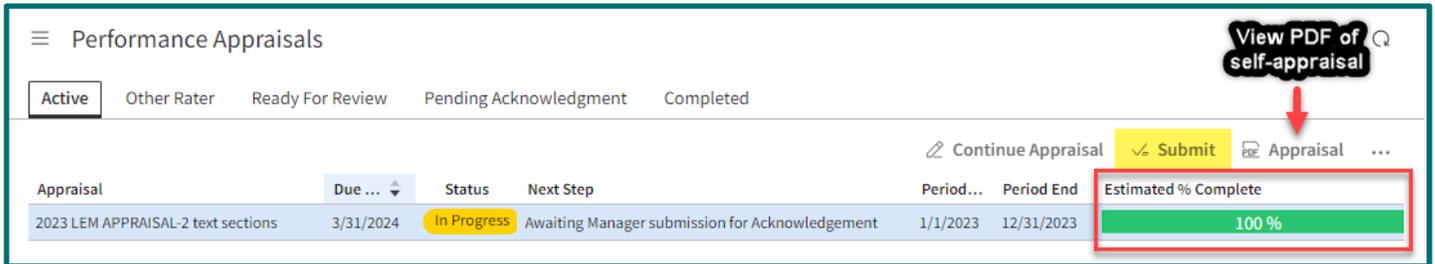
Leader Goals 2024

1 Use this text box to describe key goals or focus items for 2024 within the leader's scope of responsibility.

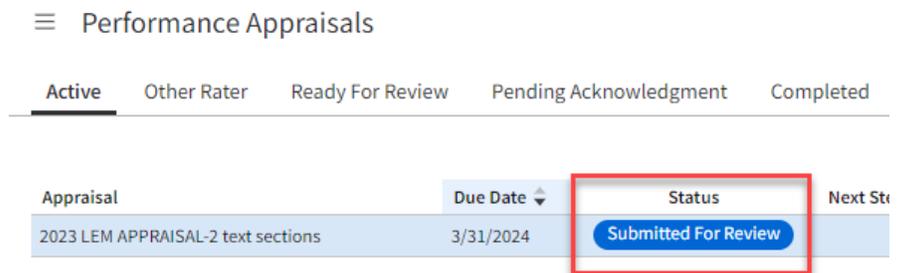
Normal Text | B | I | U | S | A | [List Icons] | [Link Icon] | [More Icon]

The **Performance Appraisals** screen displays on the **Active** tab.

Your Estimated % Complete should be 100% if all three sections of the appraisal were completed. The status will display **Awaiting Manager submission for Acknowledgment**. To submit your self-appraisal to your leader, verify you are selected on the appraisal and click **Submit** in the upper-right corner.



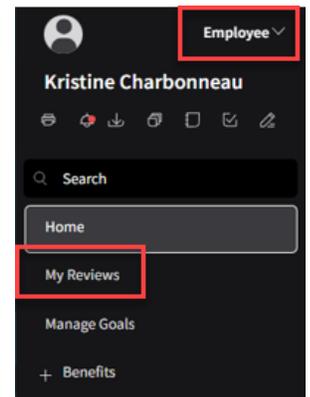
After your self-appraisal has been submitted to your leader, the Status will display **Submitted For Review**.



COMPLETED APPRAISAL LEADER ACKNOWLEDGMENT

After meeting with your leader to review your performance appraisal, your leader will submit your appraisal back to you for acknowledgment. You will receive an email indicating your appraisal is ready to be acknowledged.

To access Infor, double-click the **Infor ESS icon** on your desktop and use **two-factor authentication** with your mobile device.



You are brought to the Employee Self Service home page. On the left-hand sidebar menu, click **My Reviews**.

After selecting My Reviews, the **Performance Appraisals page** displays beginning on the **Active** tab. Click the **Pending Acknowledgment** tab. Your appraisal will appear with a status of **Awaiting Employee Acknowledgment**.

To acknowledge your appraisal, verify you are selected on the appraisal and click **Acknowledge**.

Performance Appraisals

Active Other Rater Ready For Review **Pending Acknowledgment** Completed

View PDF of completed appraisal

Consolidated Appraisal Acknowledge

Appraisal	Due Date	Next Step	Period Begin	Period End
2023 LEM APPRAISAL-2 text sections	3/31/2024	Awaiting Employee Acknowledgement	1/1/2023	12/31/2023

You can add comments to the acknowledgment window to be saved with your appraisal. Comments are optional. Click **Submit**.

Once the appraisal is acknowledged, it is now completed. To view the completed appraisal, click the **Completed** tab.

Performance Appraisals

Active Other Rater Ready For Review Pending Acknowledgment **Completed**

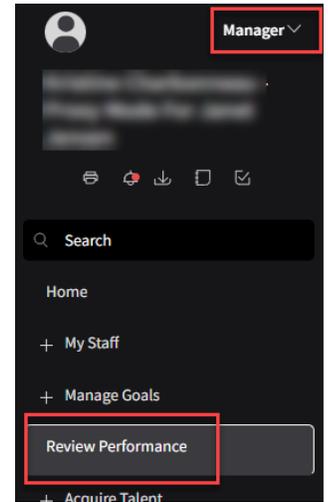
Historical

<input type="checkbox"/>	Appraisal	Next Step	Period Begin	Period End	Document ...
<input type="checkbox"/>	2023 LEM APPRAISAL-2 text sections	Completed	1/1/2023	12/31/2023	Manager

ONE-UP LEADER APPRAISAL

If you have leaders reporting directly to you, you will need to complete an appraisal and meet with the leader to review the appraisal. You will receive email notification for each leader you need to complete an appraisal for.

To access Infor, double-click the **Infor ESS icon** on your desktop and use **two-factor authentication** with your mobile device.



You are brought to the Employee Self Service home page. Change your view by clicking the **Employee drop down** on the left-hand sidebar menu and selecting **Manager**. On the left-hand sidebar menu, click **Review Performance**.

Leaders should complete their self-appraisal prior to meeting with their one-up leader. You will receive email notification when a leader's self-appraisal is completed and submitted for review.

A leader's self-appraisal can be viewed in two ways. The first way is through the **My Staff** tab within the **Review Performance** activity.

Click **My Staff**. You are brought to the **Active** tab.

Select the **leader** you'd like to view. You may need to click to the next page to view more staff.

On the **Active** tab for the leader selected, you will see a lower section called **Appraisal Status**. This will display the leader's self-appraisal, status and % completed. To view the self-appraisal as a PDF, click the **Appraisal Owner (leader's name) blue hyperlink**.

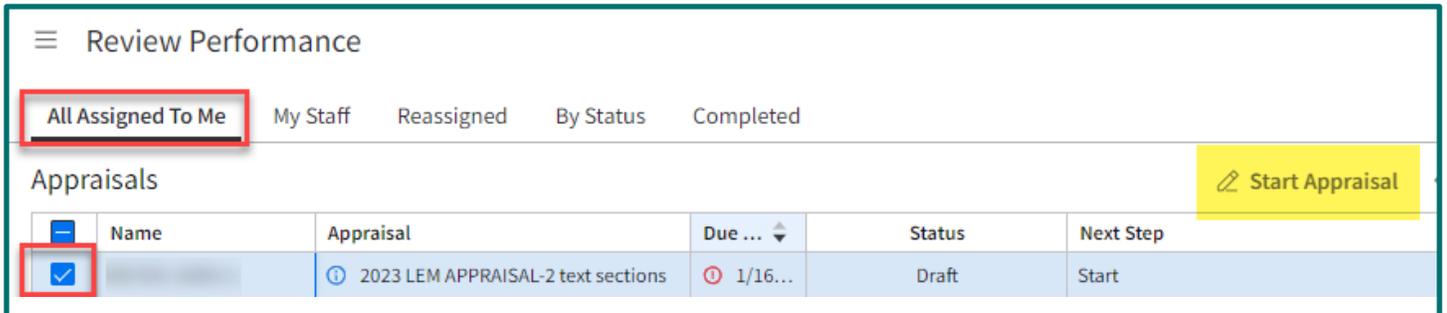
The screenshot shows the 'Review Performance' interface. At the top, there are tabs for 'All Assigned To Me', 'My Staff', 'Reassigned', 'By Status', and 'Completed'. Below these are filters for 'Active', 'Ready For Review', 'Pending Acknowledgment', 'Completed', and 'Errors'. A search bar is on the left. The main area contains a table of appraisals:

Appraisal	Due Date	Status	Next Step	Appraisal Owner	Estimated % Complete
2023 LEM APPRAISAL-2 text sections	1/16/2024	Draft	Start	JENSEN, JANET M.	0 %
2023 LEM APPRAISAL-2 text sections	3/31/2024	Draft	Start	JENSEN, JANET M.	0 %

Below the table is the 'Appraisal Status' section, which includes a table with columns for 'Docu...', 'Appraisal Owner', 'Appraisal Owner', 'Manager', 'Status', 'Next S...', and 'Estimated % Complete'. One entry is visible:

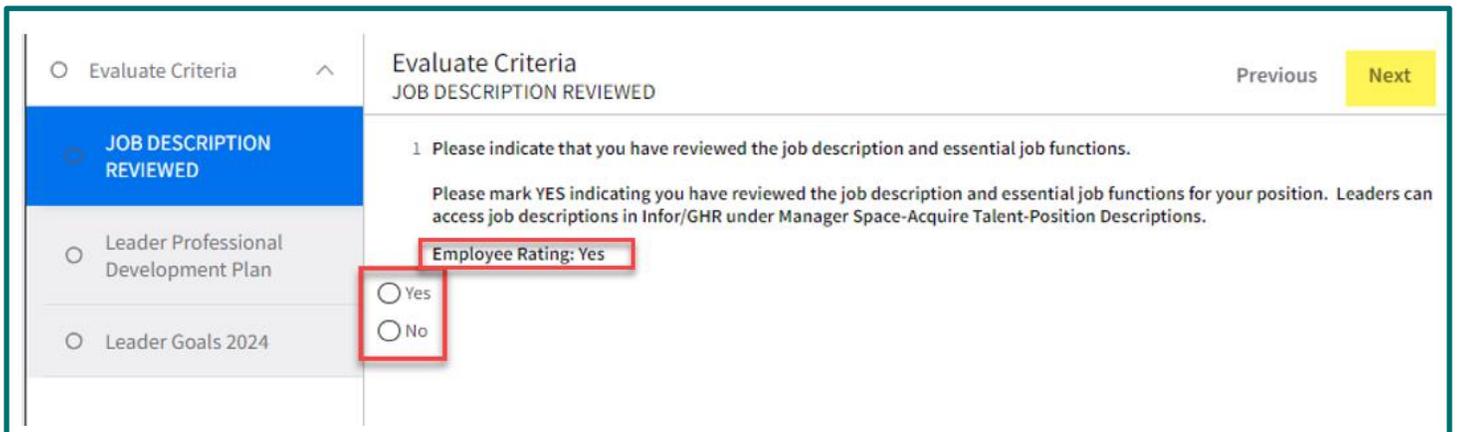
Docu...	Appraisal Owner	Appraisal Owner	Manager	Status	Next S...	Estimated % Complete
Employee			JENSEN, JANET M.	Submitted For Review		100 %

The second way to view a leader’s self-appraisal is within the appraisal that you are completing for the leader. To begin a leader’s appraisal, select the **All Assigned To Me** tab on the **Review Performance** screen. Select the **checkbox** to the left of the leader’s name whose appraisal you’d like to start. Click **Start Appraisal** in the upper-right corner.



There are three sections within the leader appraisal to complete. They are the same three sections found within the self-appraisal. The leader’s self-appraisal answers display in each section of the appraisal shown in the screenshots below.

The first section is: **Job Description Reviewed**. Read the text and indicate **Yes or No** as your answer choice. Once you have completed this section, click **Next** in the upper-right corner.



The second section is: **Leader Professional Development Plan**. Read the text and **type your response** in the text box.

Once you have completed this section, click **Next** in the upper-right corner.

Evaluate Criteria Previous Next

Leader Professional Development Plan

1 Use this text box to describe opportunities for professional development and continued growth as a leader.

Employee Response:
test

Normal Text | B | I | U | S | A | [List Icons] | [Link Icon] | [More Icon]

The third section is: **Leader Goals 2024**. Read the text and **type your response** in the text box.

Once you have completed this section, click **Save And Close** in the upper-right corner.

Evaluate Criteria Previous Save And Close

Leader Goals 2024

1 Use this text box to describe key goals or focus items for 2024 within the leader's scope of responsibility.

Employee Response:
test

Normal Text | B | I | U | S | A | [List Icons] | [Link Icon] | [More Icon]

After you meet with the leader to review their appraisal, the next step is to Submit the appraisal.

On the **All Assigned to Me** tab within **Review Performance**, verify you are selected on the correct leader. The appraisal status displays **In Progress**. Click **Submit**.

Review Performance PDF Q

All Assigned To Me My Staff Reassigned By Status Completed

Appraisals Continue Appraisal **Submit** Consolidated Appraisal ...

<input type="checkbox"/>	Name	Appraisal	Due ...	Status	Next Step	Manager	Appraisal O
<input type="checkbox"/>		2023 LEM APPRAISAL-2 text sections	1/16...	Draft	Start	JENSEN, JANET M.	JENSEN, JAI
<input type="checkbox"/>		2023 LEM APPRAISAL-2 text sections	3/31/2024	Pending Acknowledgment	Awaiting Employee Acknowledgement	JENSEN, JANET M.	JENSEN, JAI
<input type="checkbox"/>		2023 LEM APPRAISAL-2 text sections	3/31/2024	Ready For Review	Submit to Employee	JENSEN, JANET M.	JENSEN, JAI
<input checked="" type="checkbox"/>		2023 LEM APPRAISAL-2 text sections	3/31/2024	In Progress	Finalize	JENSEN, JANET M.	JENSEN, JAI
<input type="checkbox"/>		2023 LEM APPRAISAL-2 text sections	3/31/2024	Draft	Start	JENSEN, JANET M.	JENSEN, JAI
<input type="checkbox"/>		2023 LEM APPRAISAL-2 text sections	3/31/2024	Draft	Start	JENSEN, JANET M.	JENSEN, JAI

You are prompted to enter your **Meeting Date**. After you have entered the date, click **Submit**.

Submit Appraisal

By submitting this appraisal, the appraisal will be viewable to the resource. Click Submit to confirm.

Meeting Date

After you have submitted the appraisal, the status displays **Ready for Review**.

To submit the appraisal to the leader for acknowledgment, verify the checkbox is selected for the correct leader, and click **Submit To Employee**.

Review Performance

All Assigned To Me My Staff Reassigned By Status Completed

Appraisals Update Meeting Date Submit To Employee Consolidated Appraisal ...

<input type="checkbox"/>	Name	Appraisal	Due ...	Status	Next Step	Manager	Appraisal O
<input type="checkbox"/>		2023 LEM APPRAISAL-2 text sections	1/16...	Draft	Start	JENSEN, JANET M.	JENSEN, JAI
<input type="checkbox"/>		2023 LEM APPRAISAL-2 text sections	3/31/2024	Pending Acknowledgment	Awaiting Employee Acknowledgement	JENSEN, JANET M.	JENSEN, JAI
<input checked="" type="checkbox"/>		2023 LEM APPRAISAL-2 text sections	3/31/2024	Ready For Review	Submit to Employee	JENSEN, JANET M.	JENSEN, JAI
<input type="checkbox"/>		2023 LEM APPRAISAL-2 text sections	3/31/2024	In Progress	Finalize	JENSEN, JANET M.	JENSEN, JAI
<input type="checkbox"/>		2023 LEM APPRAISAL-2 text sections	3/31/2024	Draft	Start	JENSEN, JANET M.	JENSEN, JAI
<input type="checkbox"/>		2023 LEM APPRAISAL-2 text sections	3/31/2024	Draft	Start	JENSEN, JANET M.	JENSEN, JAI

After the appraisal has been submitted to the leader for acknowledgment, the status displays **Pending Acknowledgment**.

Review Performance

All Assigned To Me My Staff Reassigned By Status Completed

Submit To Employee Completed X

Appraisals Consolidated Appraisal ...

<input type="checkbox"/>	Name	Appraisal	Due ...	Status	Next Step	Manager	Appraisal O
<input type="checkbox"/>		2023 LEM APPRAISAL-2 text sections	1/16...	Draft	Start	JENSEN, JANET M.	JENSEN, JAI
<input type="checkbox"/>		2023 LEM APPRAISAL-2 text sections	3/31/2024	Pending Acknowledgment	Awaiting Employee Acknowledgement	JENSEN, JANET M.	JENSEN, JAI
<input checked="" type="checkbox"/>		2023 LEM APPRAISAL-2 text sections	3/31/2024	Pending Acknowledgment	Awaiting Employee Acknowledgement	JENSEN, JANET M.	JENSEN, JAI

After the leader acknowledges the appraisal, the appraisal will now appear under the Completed tab. To view the completed appraisal, click **My Staff** on the **Review Performance** activity. Select the leader whose completed appraisal you want to view. Click the **Completed** tab for the leader. Here displays all completed appraisals after leader acknowledgment.

Review Performance

All Assigned To Me My Staff Reassigned By Status Completed

Create Appraisal ... Active Ready For Review Pending Acknowledgment Completed Errors

Search by Name

NURSING PROFESSIONAL ...

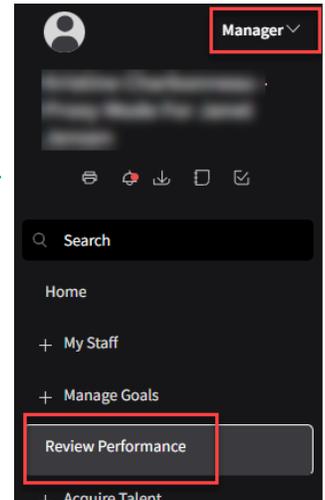
Historical

<input type="checkbox"/>	Appraisal	Period B...	Period E...	Documen...	Appraisal Owner
<input type="checkbox"/>	2023 LEM APPRAISAL-2 text sections	1/1/2023	12/31/2023	Manager	JENSEN, JANET M.
<input type="checkbox"/>	2023 LEM APPRAISAL-2 text sections	1/1/2023	12/31/2023	Employee	

REASSIGN APPRAISAL

To reassign an appraisal to another leader to complete, follow the steps below.

To access Infor, double-click the **Infor ESS icon** on your desktop and use **two-factor authentication** with your mobile device.



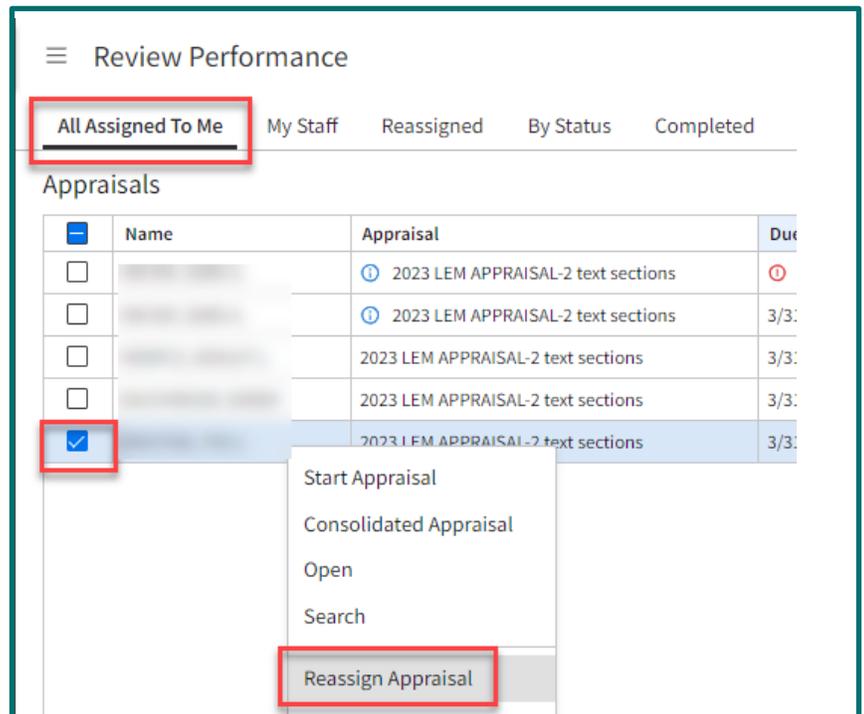
You are brought to the Employee Self Service home page.

Change your view by clicking the **Employee drop down** on the left-hand menu and selecting **Manager**.

On the left-hand sidebar menu, click **Review Performance**.

The **Review Performance** activity displays with the **All Assigned To Me** tab showing all active appraisals assigned to you.

To reassign an appraisal, right click on the correct leader/appraisal row and select **Reassign Appraisal**.



The **Reassign Performance Appraisal** window displays. In the **Assign To Manager** field, click the **Magnifying glass. Search** for the leader you want to reassign the appraisal to in the **Name** field. Once you've found the leader, **select** their name. **Verify** the leader you selected displays next to the **Assign To Manager** field.

Click **Submit**.

The appraisal is now reassigned to the leader you selected.

Reassign Performance Appraisal For [redacted] LEM APPRAISAL-2 text sections

Current Appraisal Owner
[redacted]

Select New Appraisal Owner

Assign To Me

- OR -

Assign To Manager

309

- OR -

Assign To Employee

Cancel Submit