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.
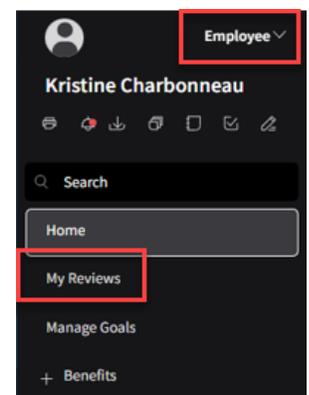
LEADER SELF-APPRAISAL

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.
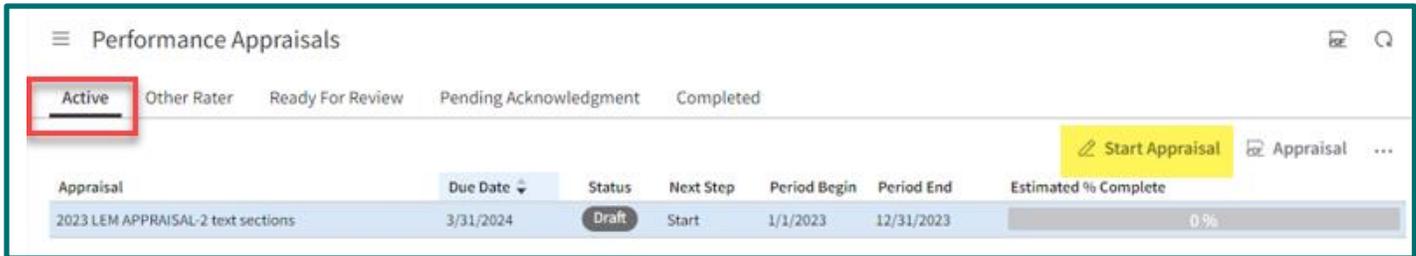

You are brought to the Employee Self Service home page.
On the left-hand sidebar menu, click **My Reviews**.

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After selecting My Reviews, the **Performance Appraisals page** displays beginning on the **Active** tab. The active **Leader Self-Appraisal** will display.
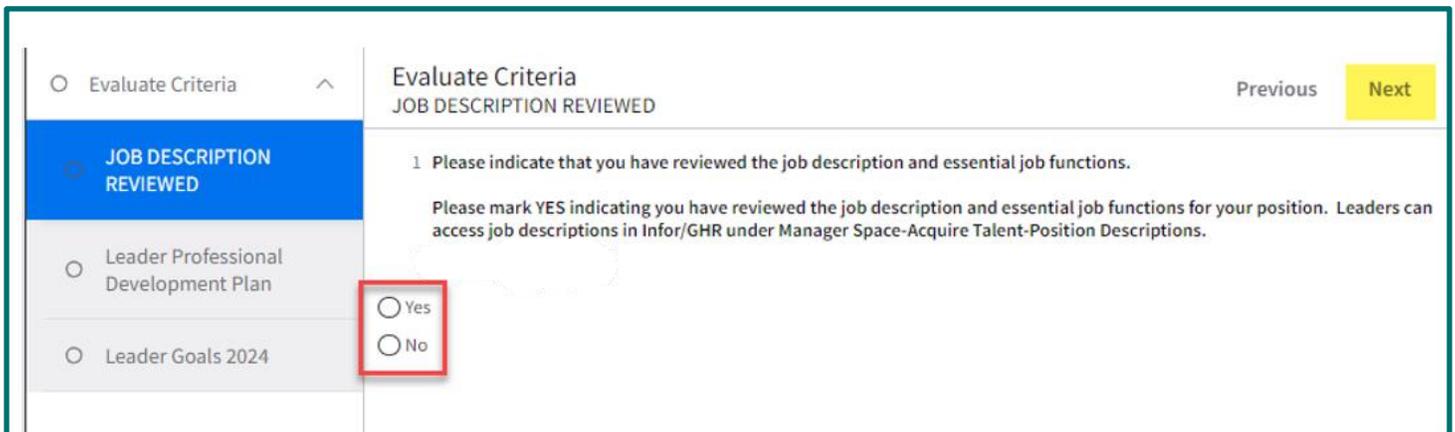
To begin the self-appraisal, verify you are selected on the appraisal, and click **Start Appraisal**.

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.

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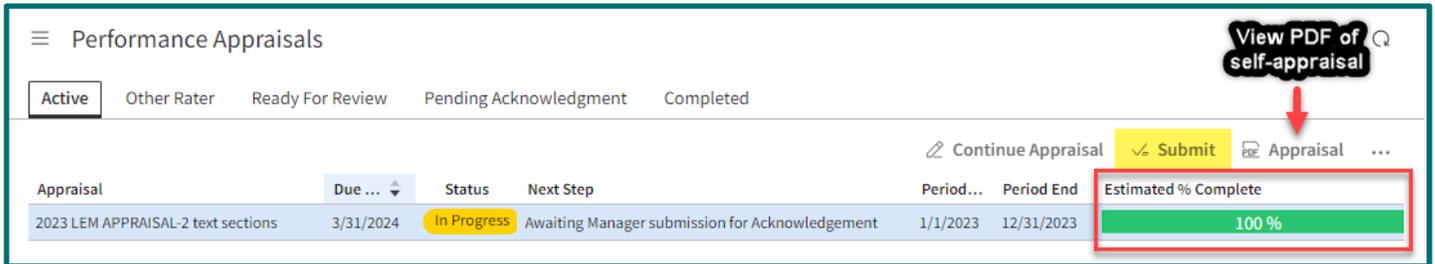
The **Performance Appraisals** screen displays on the **Active** tab.

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**.
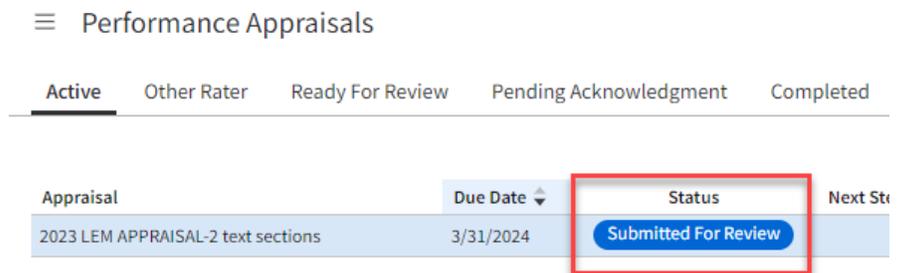
COMPLETED APPRAISAL LEADER ACKNOWLEDGMENT

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.

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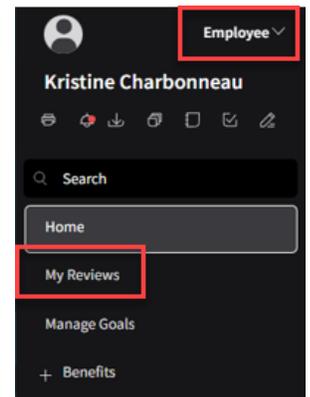
You are brought to the Employee Self Service home page.
On the left-hand sidebar menu, click **My Reviews**.

After selecting My Reviews, the **Performance Appraisals page** displays beginning on the **Active** tab. Click the **Pending Acknowledgement** 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**.

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.

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.

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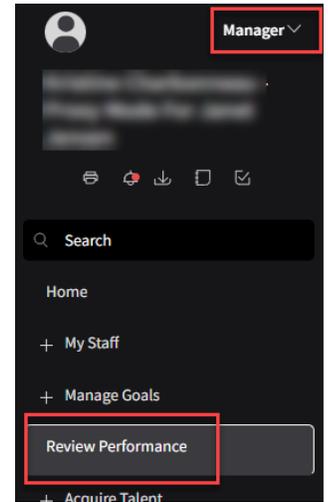
You are brought to the Employee Self Service home page.
Change your view by clicking the **Employee drop down** on the left-hand sidebar menu and selecting **Manager**.
On the left-hand sidebar menu, click **Review Performance**.

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**.
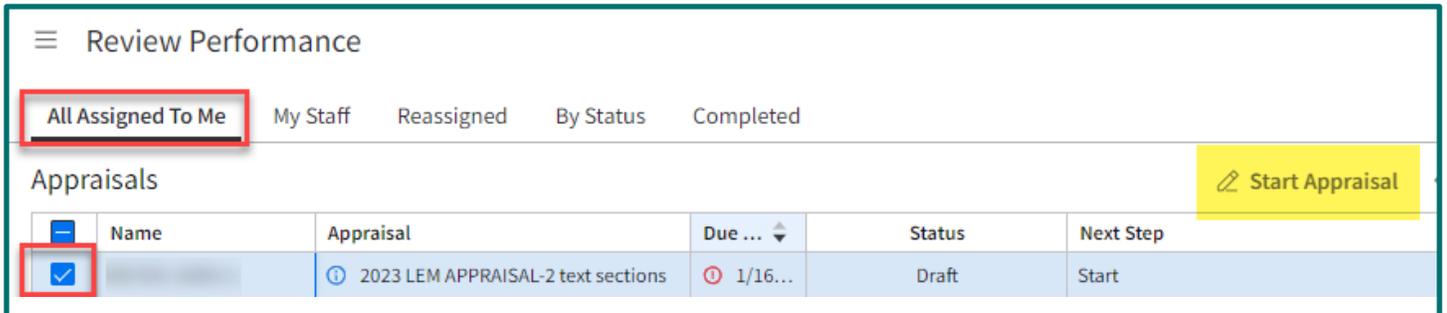
The second way to view a leader's self-appraisal is within the appraisal that you are completing for the leader.

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.

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.

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**.

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

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**.

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

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.

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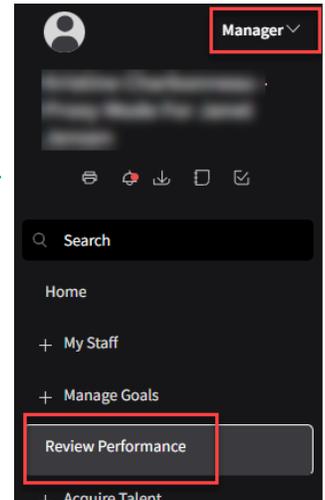
You are brought to the Employee Self Service home page.
Change your view by clicking the **Employee drop down** on the left-hand menu and selecting **Manager**.
On the left-hand sidebar menu, click **Review Performance**.

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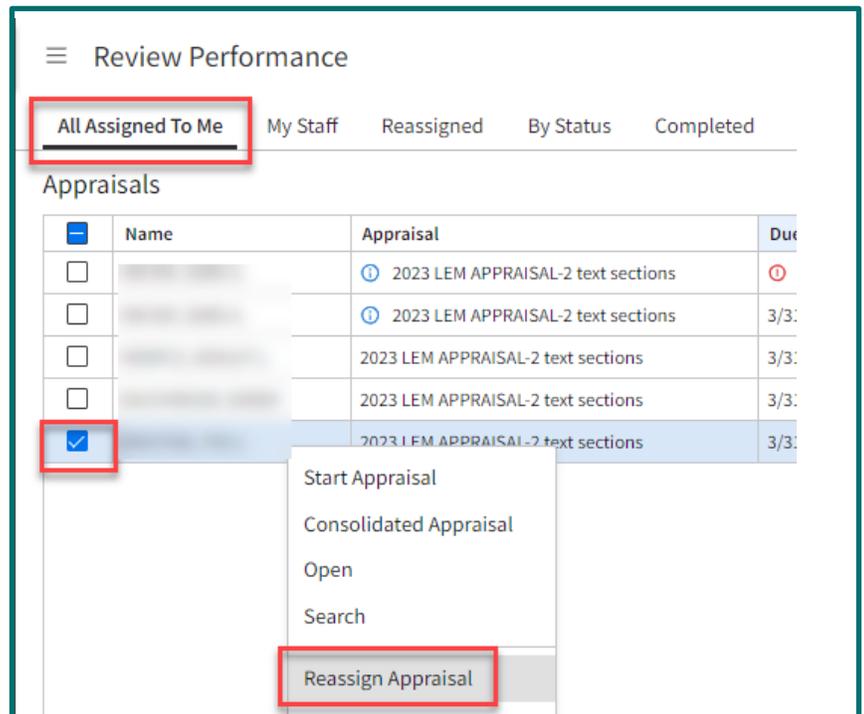
The **Reassign Performance Appraisal** window displays. In the **Assign To Manager** field, click the **Magnifying glass**. **Search** for the leader you want to reassign the appraisal to in the **Name** field. Once you've found the leader, **select** their name. **Verify** the leader you selected displays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

Click **Submit.**

The appraisal is now reassigned to the leader you selected.

Reassign Performance Appraisal For ▓▓▓▓▓▓▓▓▓ LEM APPRAISAL-2 text sections

Current Appraisal Owner
▓▓▓   ▓▓▓ ▓▓▓

Select New Appraisal Owner

☐ Assign To Me

- OR-

Assign To Manager

| 309 | Q≡ | ▓▓▓ ▓▓▓ ▓▓▓ |

- OR-

Assign To Employee

| | Q≡ |

Cancel   **Submit**