

Reopen a Submitted Colleague Input Form (Leaders Only)

Important Notes

- A. Only the direct report's leader (Primary Reviewer) can reopen a submitted Colleague Input form.
- B. Colleague Input forms are a part of the Direct Report's Performance Appraisal so are accessed via his/her appraisal.
- C. For additional assistance, visit the [Performance Management](#) website.

1. Access Appraisal
2. Select the Submitted Colleague Form
3. Reopen Colleague Form
4. Notify Peer that Form is Available

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1. Access Appraisal

A. From the Manager Dashboard, Open the Team Member's Performance Appraisal (steps 1 – 4)

Manager Dashboard

Alerts

Pending Approvals

My Team's Performance Status

Direct Line Reports

Company Directory

Quick Links

B. Click "Performance Appraisal" for the team member's FY18 appraisal document

Performance Documents

Listed below are all the performance appraisals for the direct report you selected.

Name	Document Type	Document Status	Period Begin	Period End	Job Title	Manager	Rating
Ann Assistant	Performance Appraisal	Evaluation in Progress	07/01/2017	06/30/2018	Assistant Nurse Manager	Nancy Manager	
Ann Assistant	Performance Appraisal	Completed	07/01/2016	06/30/2017	Assistant Nurse Manager	Nancy Manager	2.25

Return to Manager Dashboard

Click Performance Appraisal.

Pay close attention to the Period Begin and End dates to ensure you select the FY18 document line!

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2. Select Submitted Colleague Form

A. Open the "View" window from "Review Colleague Input" task

Performance Process

Steps and Tasks

Mary Nurse
Performance Appraisal
07/01/2017 - 06/30/2018

- Establish Personal Goals
Due Date: 12/31/2017
- Request Colleague Input
Due Date: 08/31/2018
- Review Colleague Input**
Due Date: 08/31/2018
View
- Review Employee Self-Appraisal
Due Date: 08/31/2018

Reference Materials

Values (FY18)

Performance Appraisal
Manager Appraisal - Update and Submit

Mary Nurse

Job Title: RN Clinician 2
Document Type: Performance Appraisal
Template: 2018 Nursing Clin Ladder
Status: Evaluation in Progress

Manager: Ann Assistant
Period: 07/01/2017 - 06/30/2018

Enter ratings and comments for each section as applicable. Save any changes.

Calculate All Ratings | Cancel Evaluation

Personal Goals | Job Responsibilities | ASPIRE | Strengths

Section 1 - Personal Goals

To edit the Personal Goals, click on the 'pencil' icon. You may add, edit, or delete Personal Goals. Please maintain 4 Work Plan aligned goals and 1 Leadership Development goal for the appraisal year.

Expand | Collapse | Add Item

Team Development Goal

B. In the Participant Evaluation window, click the Colleague's name.

A status of "Completed" indicates the form has been submitted.

Performance Appraisal
Manager Appraisal - Update and Submit

Mary Nurse

Job Title: RN Clinician 2
Document Type: Performance Appraisal
Template: 2018 Nursing Clin Ladder & Wge
Status: Evaluation in Progress

Manager: Ann Assistant
Period: 07/01/2017 - 06/30/2018
Document ID: 48111
Due Date: 08/31/2018

Participant Evaluation

Participant	Role	Status	Due Date
William Colleague	Colleague	Completed	08/31/2018

Return

Click colleague name associated with the "Completed" Colleague Input form

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3. Reopen Colleague Form

A. Verify the Colleague Appraisal is on screen then click Reopen.

Performance Appraisal
Colleague Appraisal
Mary Nurse

Actions ▾

 Job Title RN Clinician 2
Document Type Performance Appraisal
Template 2018 Nursing Clin Ladder & Wage
Status Completed
Reviewer William Colleague

Manager Ann Assistant 2018

The appraisal status is Completed.

Personal Goals | Job Responsibilities | ASPIRE | Summary

Section 1 - Personal Goals
Please provide a rating and comments for each Personal Goal if applicable to your experience in working with this employee.
Expand | Collapse

Team Development Goal
Professional Development Goal

B. Confirm the Reopen Appraisal action

Reopen Appraisal

You have chosen to reopen this appraisal. To confirm that you would like to have the appraisal set back to 'In Progress' status, click the OK button.

Click "Confirm" then verify the "Success" message is displayed.

Confirmation - Reopen Evaluation

You have successfully reopened the selected performance appraisal.

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4. Notify Peer that Form is Available

Email the Colleague

1. Colleague Input form has been Reopened
2. They access it via **Self Service – Performance Management – Other's Performance Documents – Current Evaluations**

The screenshot shows the navigation path: Self Service > Performance Management > Other's Performance Documents > Current Evaluations. Red circles with numbers 1 through 4 highlight each step in the path.

The screenshot shows the 'Current Requests for Input' page. Below the instructions, there is a table with the following data:

Name	Document Type	Status	Period Begin	Period End
Mary Nurse	Performance Appraisal	Evaluation in Progress	07/01/2017	06/30/2018