

Performance Appraisal Form for Staff – Employee Guide

The purpose of this form is to support an open and constructive discussion that leads to a clear understanding of the employee's past performance, as well as future expectations and development objectives.

There are five phases in the performance appraisal form for a staff-contributor:

- PHASE 1: Employee initiates the form by choosing manager and completing the Self-Appraisal. Form is routed to the manager.
- PHASE 2: Manager reviews the employees Self-Appraisal and enters Manager Assessment (*three scenarios are covered*). Form is routed back to employee.
- PHASE 3: Employee reviews Manager Assessment and Comments and prepares for the formal discussion with manager.
- PHASE 4: Employee and Manager meet to discuss the employee's performance.
- PHASE 5: Employee signs off on the form and sends it to manager for sign-off.

PHASE 1 (Employee)

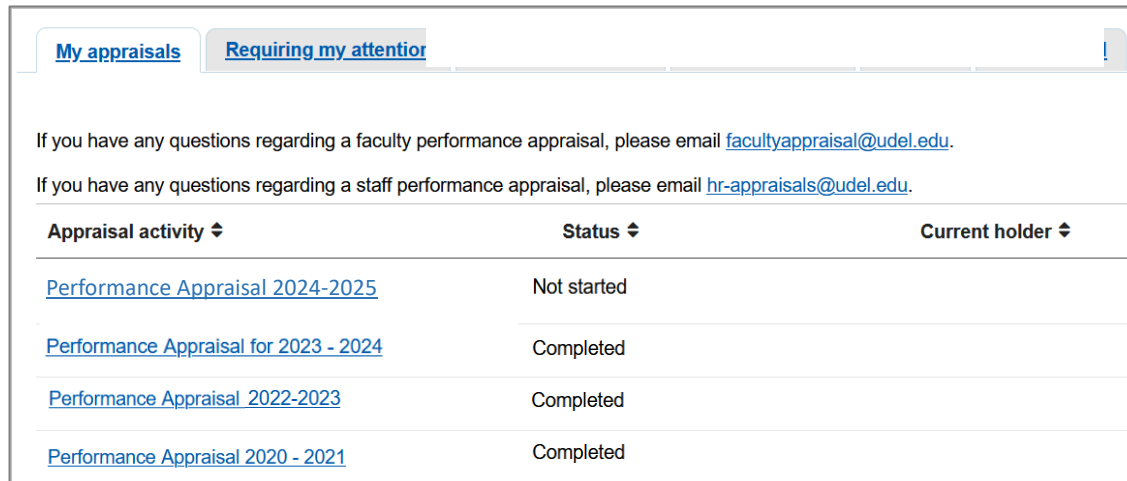
Employee initiates the form

Form Instructions

Considerations / Resources

Link to form:

<http://www1.udel.edu/performanceappraisal>



The screenshot shows a web interface with two tabs: "My appraisals" and "Requiring my attention". Below the tabs, there are two lines of text providing email addresses for faculty and staff performance appraisal questions. A table follows with three columns: "Appraisal activity", "Status", and "Current holder".

Appraisal activity	Status	Current holder
Performance Appraisal 2024-2025	Not started	
Performance Appraisal for 2023 - 2024	Completed	
Performance Appraisal 2022-2023	Completed	
Performance Appraisal 2020 - 2021	Completed	

1. **You will see a list of your current and past Performance Appraisal (PA) forms.**

- Click the link for the current year to begin your PA form, by default it is the last one.
- If you don't see the current year's form, click the column header **Appraisal activity** to change the sort order of the forms.

Review information on the [HR website](#), which includes:

- Overview of Performance Management Program
- How to prepare for the program
- Timeline of activities
- Stages of the performance management cycle
- Additional resources

Please note:




- The form automatically saves your work.
- After a period of inactivity, the form may lock you out. Please wait 30 minutes to log back in.

IMPORTANT: The screenshots in this guide reflect the 2024–2025 appraisal period and are provided as examples only. When opening an appraisal, be sure to select the one in the **current** appraisal period.




Employee: Kent,Clark (999999999)

PERFORMANCE APPRAISAL: 07/01/2024 – 6/30/2025

The purpose of this form is to support an open and constructive discussion that leads to a clear understanding of the employee's past performance, as well as future expectations and development objectives. Both employee and manager are encouraged to share responses in their respective sections of the form during the feedback session.

Symbol key:  Incomplete,  Complete, * Required information,  Error

 Switch to Print View

 Employee information	Employee information				
 Employee Self Appraisal	Employee: Kent,Clark (999999999)				
 Review & submit	Position: Administrative Specialist (10000254)				
	Department/Office: Athletic News Reporting (99999)				
	Supervisor(s): * Supervisor(s): Choose individual(s) who will rate your performance.				
	<table border="1"> <thead> <tr> <th>Supervisor</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td><input type="text" value="Lookup supervisor"/></td> <td></td> </tr> </tbody> </table>	Supervisor	Action	<input type="text" value="Lookup supervisor"/>	
Supervisor	Action				
<input type="text" value="Lookup supervisor"/>					
	Appraisal period: 07/01/2024 - 05/02/2025				
	Date due to HR: 05/02/2025				
	<input type="button" value="Save & exit"/> <input type="button" value="Next step"/>				

Review the **Employee Information** on the form:

- If your position description needs updating, let your manager know in Comments in the next screen.
- If you had another supervisor (manager) during the appraisal period, ask your current manager to add a Reviewer to the form's routing when the form comes to them.

1. **Position** – click the link to review the position description.
2. **Supervisor** – use the **Lookup supervisor** button to find your current Manager's name
 - NOTE - Only one **Supervisor** is allowed
3. Click **Next step** to go to **Employee Self-Appraisal** or use left navigation

Enter answers to these five Questions and one Comment:

1. **What are the most important things you have accomplished over the past year?**
2. **What professional development opportunities did you have during the past year?**
3. **What did you learn from these experiences?**
4. **What specific skills would you like to develop over the next year?**
5. **How can your manager best support your growth and success?**
6. **Optional: Considering those that you work closely with, what opportunities exist to enhance your work environment? Examples include communication, collaboration, and inclusion. Consider strengths to sustain and opportunities for improvement.**

Attachments (optional)

Optional: Attach files that pertain to your performance appraisal. These files can include quarterly goal calibration documents, letters, and other additional supporting documentation. Files must be less than 1MB.

File	Description	Added by	Action
<input type="button" value="Browse..."/>	No file selected.	<input type="text"/>	<input type="button" value="Save attachment"/>

- Use the **Browse** button to add document(s) to support to your answers or comments.

Considerations for your answers

1. These should be individual goals that were met, stretch assignments and/or exemplary outcomes, or results from your job description.
 - What were you expected to achieve in your role?
 - Did you solve a problem or overcome an obstacle?
 - How did you accomplish an assignment or results? And what was the impact?
 - If possible, use data to tell your story.
 - Create a tracking system to gather data throughout the year.
2. Describe your professional development accomplishments, such as courses or classes attended, certifications earned, conferences attended, mentorship, and new project(s) taken on, etc.
3. Mention skills, insights, knowledge gained from them.
4. Add high-payoff development opportunities that contribute to individual, team and organizational goals, needs and priorities.
5. Describe behaviors you need more or less of. Describe resources needed or opportunities sought.
6. (Optional) Provide comments about factors that impact your work environment. Include both positive and negative factors.

Refer to the document *Tips for Completing the Self-Appraisal Questions* for additional guidance.

Attachments are optional.

- Attach files that pertain to your performance appraisal. These files can include quarterly goal calibration documents, letters, and other additional supporting documentation.
- Files must be less than 1MB.

- ✔ Employee information
- ✔ Employee Self Appraisal
- ▶ Review & submit

PERFORMANCE APPRAISAL 2024 - 2025

Employee information

Employee: [Kent,Clark](#)

Position: [Communications Specialist I \(10006370\)](#)

Routing

Status	Role	Name	Action	Date
Self-appraisal	Employee	Kent,Clark	Started self appraisal.	2025-03-11
	Employee	Kent,Clark	Current holder.	
Under Review	Supervisor	Prince,Diana		
Discussion		Prince,Diana		
Signature	Employee signature	Kent,Clark		
	Supervisor signature	Prince,Diana		

When your self-appraisal is done, click the Finish & submit button to send this form to the supervisor(s) listed in the Routing section above.

Previous step
Save & exit
✔ Finish & submit

1. Review the recap of the Self-Appraisal that displays above the **Routing**.
 - If edits are needed, use the **Previous step** button.
2. Click **Finish & submit** button to send the form to your manager.

A recap of Employee Information and Self-Appraisal displays above **Employee sign-off** (not shown).

The Routing section always reflects where your appraisal form is in the process (Status) and who has it (Name).

Your manager will receive an email notification with a link to your appraisal form after you submit it.

PHASE 2 (Manager)

Manager opens your performance appraisal form and takes these actions:

- Reviews the **Position Description**
- Reviews your **Employee Self-Appraisal** answers
- Reviews your **Comments**
- Enters rating and comments in the **Manager Assessment** section
- **Submits the form back to you with one of these three scenarios:**
 - **#1** – Your manager determines no changes are needed to your Employee Self-Appraisal (see below).
 - **#2** – Your manager determines edits are needed to your Employee Self-Appraisal (See: APPENDIX page 9).
 - **#3** – Your manager adds a Reviewer to your appraisal form (See: APPENDIX Page 10).

PHASE 3 (Employee)

#1 Scenario – Self-Appraisal needs no changes

Form Instructions

Considerations / Resources

Review the Manager Assessment section



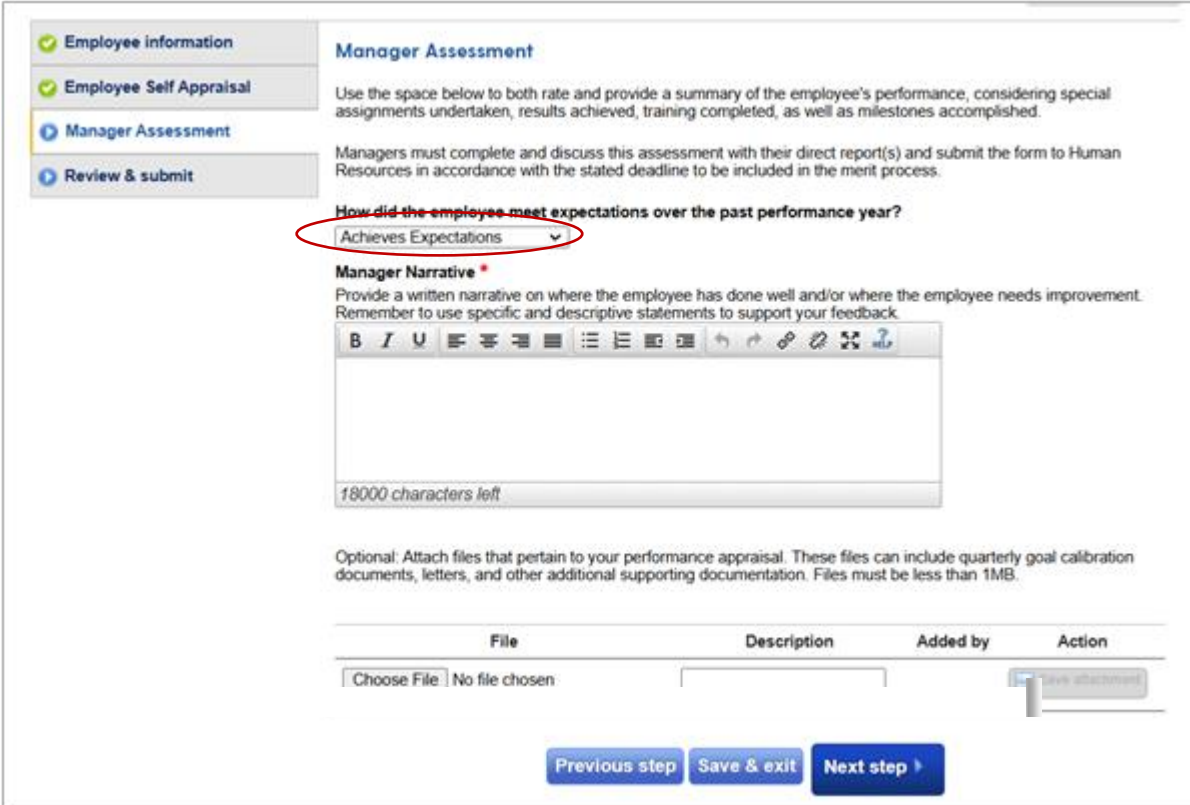
Employee information

Employee: [Kent,Clark](#)
 Position: [Administrative Specialist](#) (10000254)
 Department/Office: Compensation & Benefits (00621)
 Supervisor(s): [Prince,Diana](#)
 Appraisal period: 07/01/2024 – 06/30/2025
 Date due to HR: 05/02/2025

[Save & exit](#) [Next step ▶](#)

You will get an email notification from hr-appraisals@udel.edu alerting you that your manager has sent you the form back. It includes a link to the form for your convenience.

- Click **Manager Assessment**



Manager Assessment

Use the space below to both rate and provide a summary of the employee's performance, considering special assignments undertaken, results achieved, training completed, as well as milestones accomplished.

Managers must complete and discuss this assessment with their direct report(s) and submit the form to Human Resources in accordance with the stated deadline to be included in the merit process.

How did the employee meet expectations over the past performance year?

Achieves Expectations

Manager Narrative *

Provide a written narrative on where the employee has done well and/or where the employee needs improvement. Remember to use specific and descriptive statements to support your feedback.

18000 characters left

Optional: Attach files that pertain to your performance appraisal. These files can include quarterly goal calibration documents, letters, and other additional supporting documentation. Files must be less than 1MB.

File	Description	Added by	Action
Choose File	No file chosen		Upload Attachment

Previous step Save & exit Next step

Manager Assessment:

How did the employee meet expectations over the past performance year?

There are three ratings:

- Exceeds Expectations
- Achieves Expectation
- Does Not Meet Expectations

Take note of the rating your manager gave you in this section of the form and read the comments your manager wrote.

See suggestions for preparing for a discussion with your manager at the top of page 7.

1. Review the performance rating and comment areas.
2. Click **Next step**.
3. Do not sign off on the appraisal until you have had a discussion with your manager.
4. See page 7 for **PHASE 4**.

PHASE 4 (Employee and Manager)

Performance Discussion

Considerations / Resources

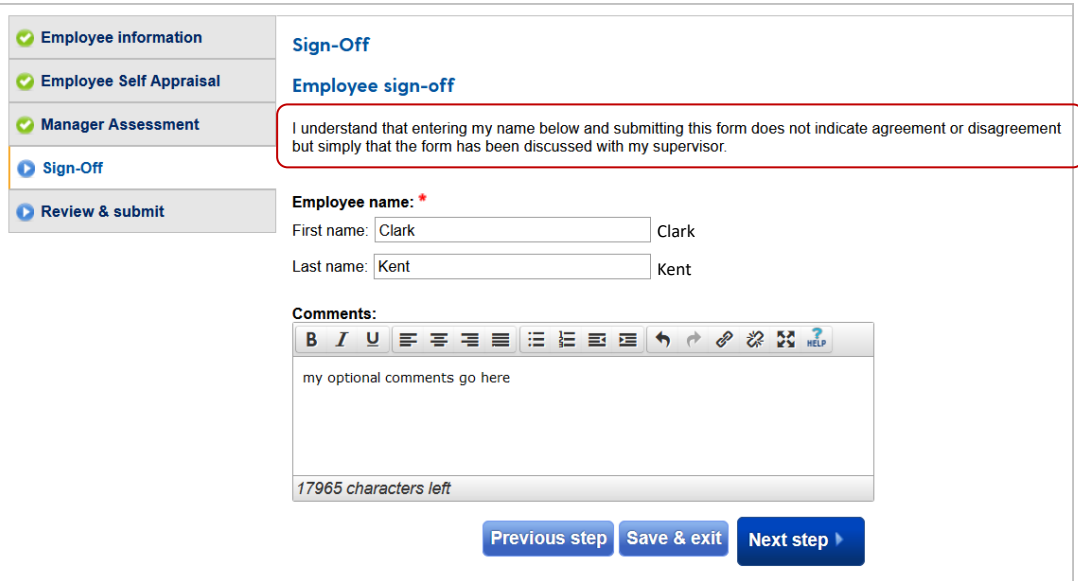
<p>Your manager will schedule and meet with you to discuss your performance.</p>	<p>After reading your manager’s comments and performance rating, prepare for the discussion:</p> <ul style="list-style-type: none"> • Review the high points from your self-appraisal • Actively listen and be open to feedback about your rating • Ask clarifying questions • Summarize your next steps • Express appreciation to your manager
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PHASE 5 (Employee)

Employee Sign-off

Form Instructions

Considerations / Resources

 <ol style="list-style-type: none"> 1. Enter your First and Last Name 2. Enter Comments if needed 3. Click Next step button 	<p>Employee sign-off statement</p> <p>Note that signing-off “does not indicate agreement or disagreement but simply that the form has been discussed” with your manager.</p>
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Sign-Off
Employee sign-off

I understand that entering my name below and submitting this form does not indicate agreement or disagreement but simply that the form has been discussed with my supervisor.

Employee name:

Routing

Status	Role	Name	Action	Date
Self-appraisal	Employee	Kent,Clark	Started self appraisal.	2025-03-11
	Employee	Kent,Clark	Completed self-appraisal. Sent to supervisor: Prince,Diana for review.	2025-03-13 10:35
Under Review	Supervisor	Prince,Diana	Completed discussion. Sent to employee: Kent,Clark for signature.	2025-03-14 14:07
Signature	Employee signature	Kent,Clark	Current holder.	
	Supervisor signature	Prince,Diana		

1. Click **Finish & submit** to send the form to your manager.

After your sign-off:

- Your manager will receive an email notification to sign-off on the appraisal form.
- After your manager signs off, it goes to Human Resources.
- HR then moves it to the Completed status.

APPENDIX

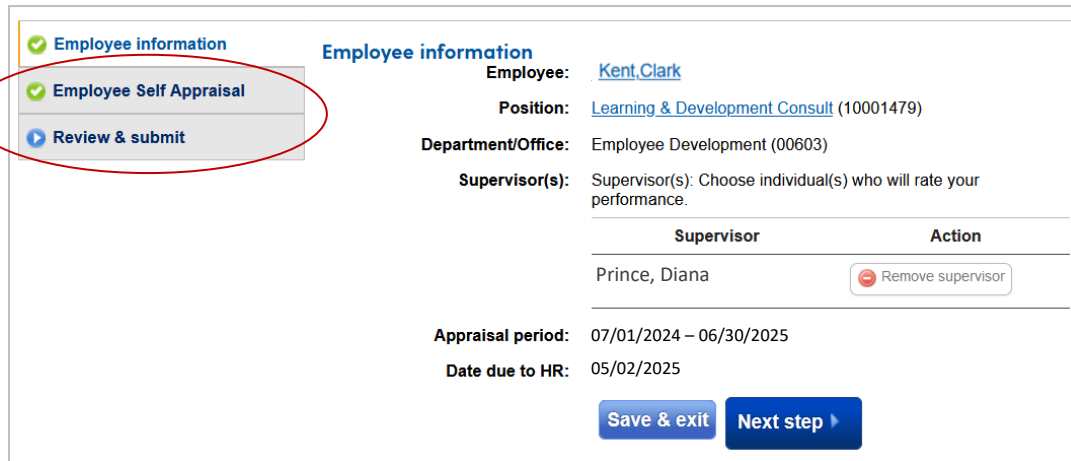
PHASE 3 (Employee) #2 Scenario

Self-Assessment was returned by manager for edits

Form Instructions

Considerations / Resources

Review the Manager Assessment section



Employee information

Employee: [Kent Clark](#)

Position: [Learning & Development Consult](#) (10001479)

Department/Office: Employee Development (00603)

Supervisor(s): Supervisor(s): Choose individual(s) who will rate your performance.

Supervisor	Action
Prince, Diana	Remove supervisor

Appraisal period: 07/01/2024 – 06/30/2025

Date due to HR: 05/02/2025

[Save & exit](#) [Next step ▶](#)

- If you want to see your manager’s **Comments**, click **Review & submit** instead
 - In the **Routing** section, you will see a row like below. Click the button to reveal the comments.

Under Review	Supervisor	Prince, Diana	Return for editing. Sent to employee: Kent, Clark for self-appraisal.	2025-03-20 15:07
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[▶ View comments to employee](#)

- Click **Employee Self-Appraisal** to make the edits requested by your manager.
- Make your edits to the **Employee Self-Appraisal**.
- Then go to **Review & submit**.
- Scroll down to **Routing** and click **Finish & submit** to send the form to your manager.
- Your manager will review the edits and send the form back to you for **PHASE 4** (the discussion about performance). See Page 7.

You will get an email notification from hr-appraisals@udel.edu alerting you that your manager has sent you the form back for editing.

The email will alert you that the form is being returned for editing and include your manager’s comments.

The email will have a link to the form for your convenience.

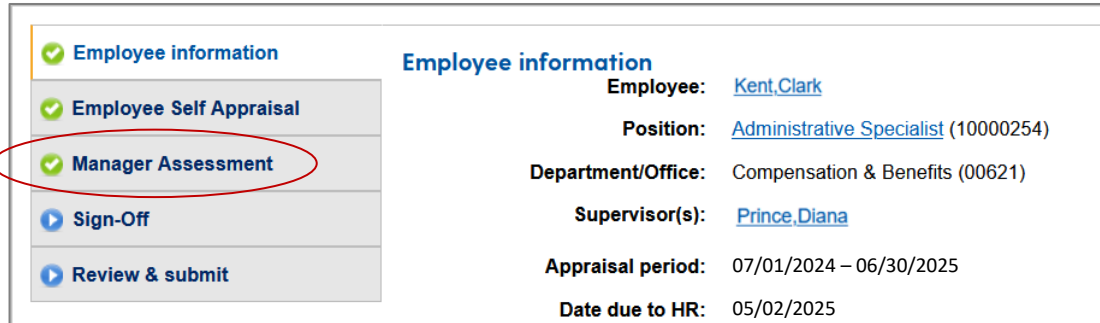
PHASE 3 (Employee) #3 Scenario

Your manager added a Reviewer

Form Instructions

Considerations / Resources

Review the Manager Assessment section



Employee information

Employee: [Kent,Clark](#)
 Position: [Administrative Specialist \(10000254\)](#)
 Department/Office: Compensation & Benefits (00621)
 Supervisor(s): [Prince,Diana](#)
 Appraisal period: 07/01/2024 – 06/30/2025
 Date due to HR: 05/02/2025

1. To see your manager’s Rating and Comments, click **Manager Assessment**.

How did the employee meet expectations over the past performance year?

Use the drop down and select one option

Achieves expectations

Comment

Comment on where the employee has done well and/or where the employee needs improvement. Remember to use specific and descriptive statements to support your feedback.

I am proud of your accomplishments and the extensive list of the professional development offerings you tackled this year.

Keep up the fine work!

2. Review the performance rating and comment areas.
3. Click **Next step** or **Review & submit**.
4. In the **Routing** section, you will see Reviewer’s comments like the row below. Click the button to reveal the comments.

Under Review	Reviewer	Stark,Tony	Continued review. Sent to supervisor: Prince,Diana.	2025-03-27 11:07
▶ View comments to employee				

5. Do not sign-off on the appraisal until you have had a discussion with your manager.
6. See page 7 for **PHASE 4**.

You will get an email notification from hr-appraisals@udel.edu alerting you that your manager has sent you the form to you after the Reviewer had added their comments.

The email will alert you that the form is being sent to you for sign-off and includes your manager’s rating and comments made by both your manager and reviewer.

The email will have a link to the form for your convenience.

Manager Assessment:

How did the employee meet expectations over the past performance year?

The three ratings are **Exceeds expectations**, **Achieves expectations**, and **Does Not Meet Expectations**. Most employees will receive a rating of **Achieves Expectations**.

- Take note of the rating your manager gave you in this section.
- Read the comments your manager wrote.

See suggestions for preparing for a discussion with your manager at the top of page 7 (**PHASE 4**).