

Performance Appraisal Form for Staff – Manager 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 six Phases in the performance appraisal form for a manager of a staff member.

- PHASE 1: Employee initiates the form by choosing supervisor (manager) and completing the Self-Appraisal. The form is routed to the manager.
- PHASE 2: Manager reviews the employee's Self-Assessment and enters Manager Assessment (three scenarios are covered).
- PHASE 3: This has three common scenarios:
 - Scenario #1 - Form sent to Employee for review of Manager Assessment (no edits needed to Employee Self-Assessment).
 - Scenario #2 - Form sent to Employee to make edits to Employee Self-Appraisal.
 - Scenario #3 - Form sent to Reviewer for additional comments.
- 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 6: Manager signs off on the form.

PHASE 1 (Employee) Employee initiates the form and takes these actions:

- Reviews the Employee Information and chooses supervisor (manager)
- Writes Employee Self-Appraisal (answers 5 questions and enters 1 comment)
- Adds optional attachment(s) as supporting documentation
- Routes the form to manager (this generates an email notification to you, their manager)

These are the 5 Questions and 1 Comment on the Employee Self-Assessment:	Guidance for your employees for each question/comment: Refer to "Tips for Completing the Self-Appraisal Questions" document for more information.
<ol style="list-style-type: none"> 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: 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. 	<ol style="list-style-type: none"> 1. These should be individual goals that were met, stretch assignments and/or exemplary outcomes or results from their job description. 2. Describe their professional development accomplishments such as courses or classes attended, certifications earned, conferences attended, 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 they need more or less of. Describe resources needed or opportunities sought. 6. Provide comment(s) on organizational climate, opportunities and other factors that impact your work environment. Include both positive and negative factors.

PHASE 2 (Manager) - Review Employee Self-Appraisal and Enters Manager Assessment

[My appraisals](#)
[Requiring my attention](#)
[View as supervisor](#)

For questions on this application, contact Human Resources at (302) 831-2171 between 8:00 a.m. and 5:00 p.m., Monday through Friday, or through email at hr-appraisals@udel.edu.

▼ Search by

Review year:

Unit:

Employee name or ID:
(enter all or part of the last name, ID, or use lookup)

Search

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.

Search results

Employee	UD ID	Supervisor	Department	Appraisal activity	Status	Action
Kent,Clark	72976	Prince,Diana	Intercollegiate Athletics Prog	Performance Appraisal for 2024 - 2025	Supervisor (Under Review)	

Find and open the employee’s form:

1. Click either tab at the top – **Requiring my attention** or **View as supervisor**.
2. In **Search results**, click on the employee’s name link to open the form.

Access the employee’s performance appraisal form one of two ways:

- Use link to Performance Appraisal System <http://www1.udel.edu/performanceappraisal>
- You will get an email notification from hr-appraisals@udel.edu alerting you that a direct has sent you a form. It includes a link to the form for your convenience.

Review Employee Information

Employee: Kent,Clark (999999999)

PERFORMANCE APPRAISAL: 07/01/2025 – 6/30/2026

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.



✔ Employee information

✔ Employee Self Appraisal

▶ Manager Assessment

▶ Review & submit

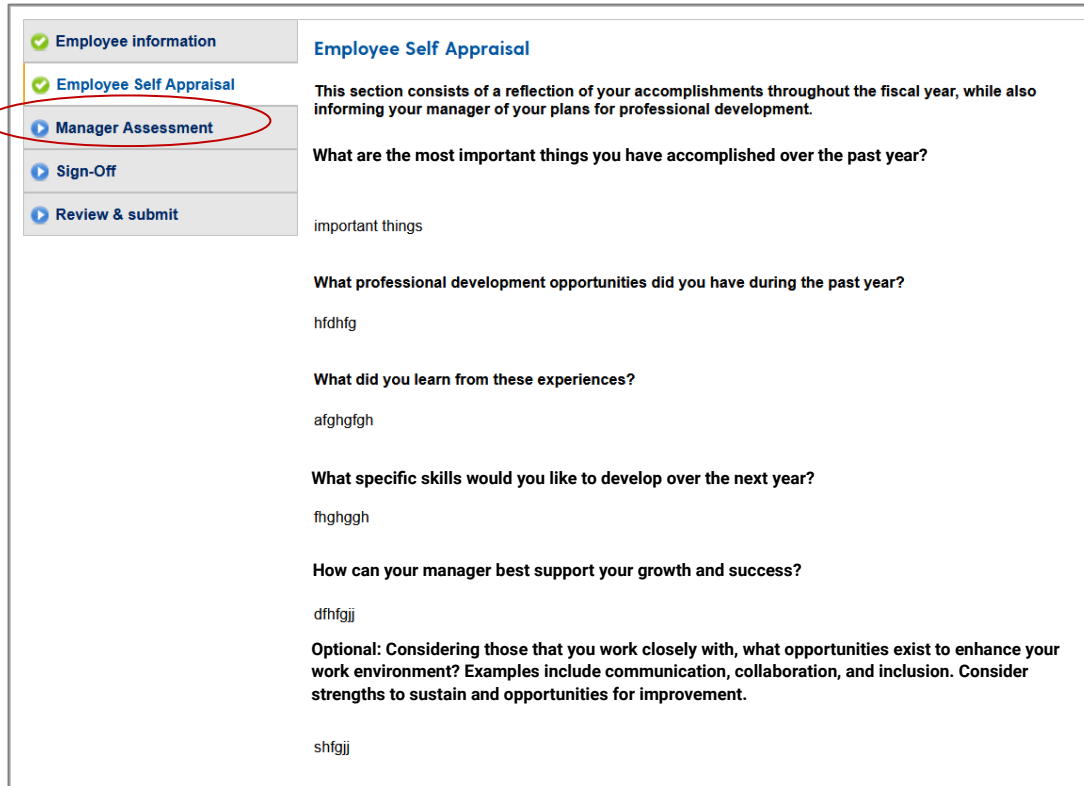
Employee information**Employee:** [Kent,Clark](#)**Position:** [Communications Specialist I \(10006370\)](#)**Department/Office:** Intercollegiate Athletics Prog (02001)**Supervisor(s):** [Prince,Diana](#)**Appraisal period:** 07/01/2023 - 04/30/2024**Date due to HR:** 05/01/2024[Save & exit](#)[Next step ▶](#)Review the **Employee Information** on the form:

- If the position description needs updating, contact HR for guidance about making edits.

Review the **Employee information**:

1. **Position** – click the link to review the position description.
2. Click **Next step** to go to **Employee Self-Appraisal** or use left navigation

Read Employee Self Appraisal



Employee Self Appraisal

This section consists of a reflection of your accomplishments throughout the fiscal year, while also informing your manager of your plans for professional development.

What are the most important things you have accomplished over the past year?

important things

What professional development opportunities did you have during the past year?

hfdhfg

What did you learn from these experiences?

afghgfh

What specific skills would you like to develop over the next year?

fghggh

How can your manager best support your growth and success?

dfhfgjj

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.

shfgjj

After reading what the employee wrote, consider:

- If the text is complete as written, or
- if there are edits you want to suggest to the employee to make the answers more complete or stronger.

1. Carefully read the **Employee Self-Appraisal** section.
2. Download and review any attachments included as supporting documentation.
3. Click **Next step** or use the left navigation to go to the **Manager Assessment**.

Enter Rating and Manager Narrative in Manager Assessment (continued)

Exceeds Expectations
Achieves Expectations
Does Not Meet Expectations

How did the employee meet expectations over the past performance year? !
Use the drop-down and select one option

Choose one ▾

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.

B I U [Text formatting icons] [Undo] [Redo] [Link] [Unlink] [Help]

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		Save attachment

Previous step **Save & exit** **Next step ▶**

Your **Manager Narrative** comments should be 2-3 paragraphs.

See the job aid called **Guidelines for Performance Ratings and Narratives** for detailed guidance.

1. Choose the employee’s rating from the drop-down list
2. Required: Write your comments about the employee’s performance in the **Manager Narrative** box
3. Optional: add attachments if needed
4. Click **Next step** or use the left navigation to go the **Review & submit** section

Route form to employee

Routing

Status	Role	Name	Action	Date
Self-appraisal	Employee	Kent,Clark	Started self appraisal.	2026-03-11
	Employee	Kent,Clark	Completed self-appraisal. Sent to supervisor: Prince,Diana for review.	2026-04-01 15:15
Under Review	Supervisor	Prince,Diana	Current holder.	
Signature	Employee signature	Kent,Clark		
	Supervisor signature	Prince,Diana		

Approver's action

Action:

Complete review. Send to employee: Kent,Clark for employee signature.

Return for editing. Send to employee: Kent,Clark for self-appraisal.

Inform the employee of the changes needed in the **Comments to employee** box below.

Add a reviewer. Optional - your department may require additional reviewers.

Comments to employee: Kent,Clark
Comments are saved on the appraisal and seen by everyone.

B I U [Rich Text Editor Icons]

18000 characters left

[Previous step](#) [Save & exit](#) [Finish & submit](#)

1. Choose the **Action** based how you want to proceed with the form.
2. Add **Comments** to the employee (1st and 2nd actions) or a reviewer (3rd action).
3. Click **Next step** or use the left navigation to go the **Finish & submit**.
4. An email notification is sent to either the employee or the reviewer.

The **Routing** reflects the status of the form and who is the current holder.

Approver's actions and when to use them:
Complete review (Scenario #1)

- Use when the Employee Self-Appraisal is good as written and does not need any edits.
- It allows employee to read the manager's assessment and comments.
- Sends the form to the employee.

Return for editing (Scenario #2)

- Use when the Employee Self-Assessment requires edits; this sends the form back to the employee.
- You should add comments to describe edits needed to Self-Assessment.
- This does *not* allow the employee to read the manager's assessment and comments yet.

Add reviewer (Scenario #3)

- Use when another reviewer is warranted (e.g., a former manager for part of the appraisal year).
- This adds another person to routing for comments only (reviewer cannot change Manager's Assessment).

PHASE 3 (Employee or Reviewer)

These are the three most common scenarios after manager Routing actions:

- **#1** – You (manager) determine no changes are needed to the Employee Self-Assessment with the *first* Approver’s Action (Complete review).
 - Form sent to **employee** to review your **Manager Assessment**.
 - You (manager) schedule a time to meet with employee for the performance discussion.
- **#2** – You (manager) determine edits are needed to the Employee Self-Assessment.
 - Form sent to **employee** to make requested edits to their Employee Self-Assessment with the *second* Approver’s Action (Return for editing).
 - After making the edits, employee routes the form back to you (manager).
 - You (manager) review/approve edits and route form back to **employee** with the *first* Approver’s Action (Complete review).
 - Form sent to **employee** to review your **Manager Assessment**.
 - You (manager) schedule a time to meet with employee for the performance discussion.
- **#3** – You (manager) add a Reviewer to the appraisal form.
 - Form sent to **reviewer** with the *third* Approver’s Action (Add a reviewer).
 - **Reviewer** reads the **Employee Self-Appraisal** and your **Manager Assessment** and **Comment**.
 - **Reviewer** can add **Comments** to manager and/or employee.
 - Form is sent back to you (manager) for review.
 - You (manager) route form to **employee** to review your **Manager Assessment** with the *first* Approver’s Action (Complete review).
 - You (manager) schedule a time to meet with employee for the performance discussion.

PHASE 4 (Employee and Manager)

Performance Discussion

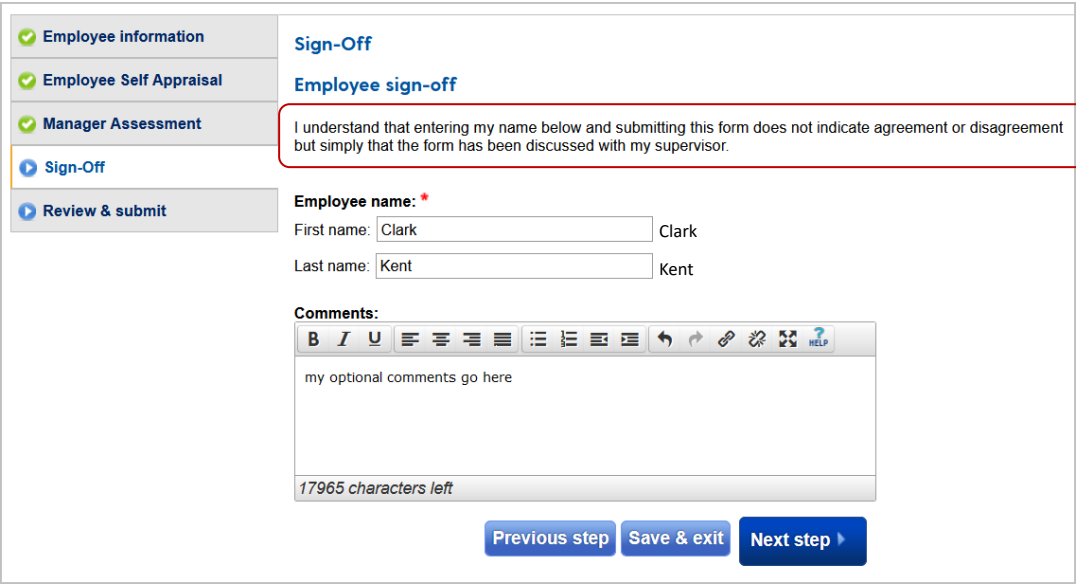
Considerations / Resources

<p>You (manager) schedule and meet with the employee to discuss their performance.</p>	<p>Prepare for the discussion:</p> <ul style="list-style-type: none"> Review job aid about performance discussion.
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PHASE 5 (Employee and Manager)

Employee Sign-off Example

Considerations / Resources

 <ol style="list-style-type: none"> This is an example of an Employee sign-off. After routing the form to you (manager) will receive an email notification that the form is ready for your sign-off. 	<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 you, their manager.</p>
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PHASE 6 (Manager)

Supervisor Sign-off

Form Instructions

Considerations / Resources

<div data-bbox="212 321 1121 946"><p>Supervisor sign-off</p><p>Prince,Diana: Choose an option to electronically sign and accept this appraisal.</p><p>I accept ▾</p><p>Comments:</p><p>B I U [List icons] [Undo] [Redo] [Link] [Help]</p><p>Completed. ~DP</p><p>17979 characters left</p><p>Previous step Save & exit Next step ▶</p></div> <ol style="list-style-type: none">1. If form is ready for your sign-off, choose I accept2. Add Comments if desired3. Click Next step	<p>You (manager) will receive an email notification to sign off on the appraisal form.</p>
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Review & Submit – Approver’s Action

Approver's action

Action:

Complete signature.

Complete signature. Send to reviewer: Optional - your department may require additional reviewers.

Return to Employee for Signature.

Cancel Form. Cancelling a form stops the appraisal process and makes the the appraisal uneditable.

Comments to employee: Clark, Kent
Comments are saved on the appraisal and seen by everyone.

B *I* U [List Icons] [Undo] [Redo] [Link] [Help]

I've signed-off on the appraisal.

DP

17950 characters left

Previous step
Save & exit
✓ Finish & submit

NOTE:
As manager, you have another chance to send the form to a Reviewer in Phase 6. A better option is to include the Reviewer in Phase 3.

After your sign-off as manager:

- The form is routed to Human Resources.
- HR then moves it to the Completed status.

4. Add **Comments to employee** (if desired)
5. **Action** – click Complete signature
6. Click **Finish & submit**