

# PERFORMANCE MANAGEMENT ONLINE

## Logging in at my.pitt.edu and Navigating to PRISM

1. Navigate to the University portal, my.pitt.edu.
2. Enter your University Computing Account username and password.
3. Click on the "Login" button.
4. Search for PRISM in the Search Bar.
5. Click on PRISM.

## Reviewing the Self-Appraisal

1. Click on the "PHR Performance Management – Supervisor" responsibility.
2. Click on the "Performance Management" link.
3. Click the "Go to Task" icon across from the *Task* for the current year.
4. Click the "Appraise" icon.
5. Click the "Show" link in the Objectives area to review Objectives.
6. Click the "Show" link to display the Questionnaire and review the responses completed by employee.
7. If the self-appraisal needs to go back to the employee for additional work, refer to **Sharing Ownership Back to Employee** instructions. If not, refer to **Completing the Performance Appraisal** instructions.

## Sharing Ownership Back to Employee

1. Click the "Share with Employee" button.
2. Check the "Update Appraisal" box in the *Employee Permissions* block by clicking on it.  
**NOTE: If this is not completed, then the employee will not be able to update the self-appraisal form.**
3. Ensure that none of the other boxes on this page are checked.
4. Enter a note in the "Notification Message to Employee" box as to why you are transferring the self-appraisal back to the employee.
5. Click the "Submit" button.

## Completing the Performance Appraisal

1. Click on the "PHR Performance Management – Supervisor" responsibility.
2. Click on the "Performance Management" link.
3. Click the "Go to Task" icon across from the *Task* for the current year.
4. Click the "Appraise" icon.
5. Click the "Update Appraisal" button.
6. Click the "Show" link in the Objectives area to review Objectives.
7. Click the "Show Questionnaire" link to display the Questionnaire and review the responses completed by employee.
8. Click the Update Approval button.
9. Click the "Show Questionnaire" link towards the bottom of the page to review the employee's responses.
10. To appraise the Competencies, click the "Update Details" link in the **Competencies** section.
11. Select the appropriate value from the drop down list in the "Performance Rating" field.
12. Enter examples that support the selected rating in the "Comments" box.
13. When finished, click the "Apply and Update Next" button to move to rate the next competency, click the "Apply" button to return to the "Update Appraisal" page, or click "Save as Draft" button to return later.
14. If the Objectives section has been completed, review the **Employee's Results Rating** from the self-appraisal.
15. Click the "Show" link to see the details of the objective.
16. Click the "Update Comments" icon to open the "Objective Details" page.
17. Review the details of the objective.
18. Select the appropriate value from the drop down list in the "Results Rating" field.
19. Enter examples in the "Comments" box in support of the results rating.
20. Click the "Apply and Update Next" button to rate the next objective, click "Apply" button to return to the "Update Appraisal" page, or click "Save As Draft" button to return later. .

21. Objectives that were not completed will be automatically moved to the next year as long as the "Date Completed" field is blank.
22. To prevent an incomplete objective from automatically transferring to the next performance year, enter 30-JUN-XX (the current year) in the "Date Completed" field and enter comments in the "Comments" box.
23. When the appraisal form is complete or to save the work to complete at a later date, click the "Save as Draft" button.
24. Summarize comments from additional participants in the Comments box in the Feedback section.
25. Select the appropriate value from the drop-down box in the "Overall Rating" field.
26. Enter supporting comments in the "Overall Comments" box.
27. Click the "Save as Draft" button to save the appraisal.

## NOTE: Supervisor Conducts Appraisal Meeting with Employee

## Transfer Ownership of Appraisal from Supervisor to Employee

1. Click on the "PHR Performance Management – Supervisor" responsibility.
2. Click on the "Performance Management" link.
3. Click the "Go to Task" icon across from the *Task* for the current year.
4. Click the "Appraise" icon.
5. Click the "Share with Employee" button.
6. Check the "Competency Ratings and Comments," "Objective Ratings and Comments," "Overall Rating" and "Overall Comments" boxes.
7. Check the "Provide Feedback on Overall Rating."
8. Enter a message to the employee in the "Notification Message to Employee" box.
9. Click the "Submit" button.

## Review Employee Feedback & Submit Appraisal for Approval

1. Click on the “PHR Performance Management – Supervisor” responsibility.
2. Click on the “Performance Management” link.
3. Click the “Go to Task” icon.
4. Click the “Appraise” icon
5. Review the comments in the “Employee Feedback” region
6. If the employee did not include feedback, the appraisal can be sent back to the employee by clicking on “Share with Employee” button.
7. If feedback is sufficient, click “Submit for Approval” button.
8. Click “Continue” button.
9. Click “Submit” button.
10. Click “Yes” button.
11. The appraisal has now been submitted to the supervisor’s supervisor for approval.

11. Follow steps 8, 9, & 10 if Objectives should be included in the printout.
12. If the questionnaire is to be included in the printout, check the “Questionnaire” box and then the “Appraiser Questionnaire” box.
13. Click the “Print” button to continue.
14. The system will create a PDF that can be saved or printed.

***Printing Completed Appraisal After the Appraisal is Approved***

1. Click on the “PHR Performance Management Supervisor” responsibility.
2. Click on the “Performance Management” link.
3. Click the “Appraisals” tab.
4. Review the “Completed Appraisals” section which is found at the bottom of the page.
5. Click the “Print” icon.
6. Follow steps 5-14 above.

*Refer to Supervisor’s Guide for additional instructions.*

**Printing**

***Printing a Completed Appraisal Before the Appraisal is Approved***

1. Click on the “PHR Performance Management – Supervisor” responsibility.
2. Click on the “Performance Management” link.
3. Click the “Go to Task” icon.
4. Click the “Print” icon on either the “Main Appraiser” page or on the “My Appraisals” page.
5. Select either “Form Layout” or “Table Layout”.
6. Select the Print Layout to be used by clicking the radio button beside it.
7. Check the “Include Setup Details” box if basic information about the employee should be printed.
8. If Competency Ratings and Comments should be printed, check the “Include Competency Details” box.
9. Highlight the Details to be printed. Do not select “Appraiser Comments” or “Appraiser Performance Rating” as no data is collected in those columns.
10. After selecting the Available Details to be included in the printout, click the “Move” arrow to move them to the “Selected Details” box.

**Contact Information:**  
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**412-624-8044**



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**Supervisor  
Quick Guide**

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