



**COLUMBIA UNIVERSITY**  
IN THE CITY OF NEW YORK

**Performance Appraisal Job Aid for Staff**

To log in to the form site, go to <http://managers.hr.columbia.edu/managing-performance>

Click the link for [Columbia University Performance Appraisal Form](#)

→ UNI   
PASSWORD

**Log In:**

Enter your UNI.  
Enter your password.  
Click Log in.

COLUMBIA UNIVERSITY  
IN THE CITY OF NEW YORK Annual Performance Appraisal Form  
John Joseph Budner, [Logout](#)

**Performance Appraisal**

**My Appraisal:**

Click My Performance to do your appraisal.

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IN THE CITY OF NEW YORK Annual Performance Appraisal Form  
John Joseph Budner, [Logout](#)

**My Performance**

My Appraisal	My Manager	Appraisal Status
Budner, John	<a href="#">select your manager</a>	<a href="#">start appraisal</a>

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**Start Appraisal:**

If your manager has not started the process for you, your first step will be to select your manager.

Click either Select your manager OR start appraisal.



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## Annual Performance Appraisal Form

John Joseph Budner, ([Logout](#))

**My Performance**

My Appraisal  
Budner, John

**Start performance appraisal:**

Please enter the UNI of the manager you would like to assign this appraisal to.

Manager's UNI:

Paul J Cortissoz    Off VP Hum Resources    ✓

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**Select your manager:**

Enter the UNI of your manger and click Continue.

Click Continue again to confirm.

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## Annual Performance Appraisal Form

John Joseph Budner, ([Logout](#))

**Performance**

My Appraisal	My Manager	Appraisal Status
Budner, John	Cortissoz, Paul	<a href="#">open</a>

**Start appraisal:**

Click the Open link in the Appraisal Status column to start the appraisal.



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## Annual Performance Appraisal Form

« [Manage Users](#)

John Joseph Budner, ([Logout](#))

### Staff Member

Name: William Worksafe  
Email: ww9876@columbia.edu

Title: Manager  
Department: Health & Safety

### Performance Appraisal Form

#### STAFF MEMBER INFORMATION

Name	<input type="text" value="John Budner"/>	Manager	<input type="text" value="Paul Cortissoz"/>
Title	<input type="text" value="Director"/>	Grade	<input type="text"/>
Review Period	<input type="text"/>	School / Department	<input type="text" value="Human Resources"/>
Date of Review	<input type="text"/>		

### Build the form:

Name, Manager and Title fields will auto populate.

Enter any missing information.

1. Grade
2. Review Period (for example FY08)
3. Date of Review (for example May 15, 20xx)

#### SUMMARY OF JOB DUTIES AND RESPONSIBILITIES

Use the + sign to begin, and click the + sign to add each individual job duty. Use the X to delete. You can enter a maximum of 5.

Please insert 3-5 of the major duties or responsibilities of this position.  
Click + to begin.

Job Duty or Responsibility

### Job Duties:

**Job Duties**  
Use this section to identify 3-5 of the major duties or responsibilities of this position. (You may instead attach a job description to the final printed form)



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## Goals:

1. At the beginning of the review period list 3-5 major goals for the year with clear Outcome, Measurement and Timeframes for each.
2. Use the Actual Results section to record the actual performance on the goals at the end of the review period.

### GOALS

Use the + sign to begin, and click the + sign to add each individual job duty. Use the X to delete. You can enter a maximum of 5.

List a maximum of 5 for the annual review period.  
Click + to begin.

Goals (Outcome)	Key Actions, Measures of Success & Timeframe	Actual Results

+ X



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## Build the form:

### Performance Attributes

1. Use this section to add up to 5 performance attributes.
2. Click the down arrow next to Attribute and select from the list.
3. The Definition and Key Actions fields will automatically populate based on your choice.

## Build the form:

### Sample Performance Attribute

**NOTE:** The text in the Key Actions field is editable as required.

**PERFORMANCE ATTRIBUTES**

Use the + sign to begin, and click the + sign to add each individual attribute. Use the X to delete. You can enter a maximum of 5.

Click [here](#) for the Performance Attributes Job Aid  
Click + to begin.

Performance Attributes X

Attribute **Attribute**

Definition

Key Actions *(Please note you can add/edit text as required)*

**PERFORMANCE ATTRIBUTES**

Use the + sign to begin, and click the + sign to add each individual attribute. Use the X to delete. You can enter a maximum of 5.

Click [here](#) for the Performance Attributes Job Aid  
Click + to begin.

Performance Attributes X

Attribute **Adaptability**

Definition

Key Actions *(Please note you can add/edit text as required)*



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## Build the form:

### Development Opportunities

1. Use this section to add up to 5 development areas for your staff.
2. Add activities related to the development area (training or coaching).
3. Add timing for each.

## Rating:

Your manager will select your overall rating.

### OPPORTUNITIES FOR DEVELOPMENT IN CURRENT ROLE AND CAREER

Use the + sign to begin, and click the + sign to add each individual job duty. Use the X to delete. You can enter a maximum of 5.

Click + to begin.

Areas to be developed	Activity (training, coaching, etc.)	Timing

+ X

### OVERALL RATING

\*\*Click one of the ratings below\*\*

- Exceeds Expectations: Performance was clearly superior, consistently exceeded the expectations and the requirements of the position.
- Meets Expectations: Performance met the expectations and the requirements of the position. Meets the high performance standards of the School or Department.
- Needs Improvement: Performance was inconsistent with regard to the expectations and the requirements of the position. Steps must be taken to further develop targeted areas which will improve overall performance.
- Does Not Meet Expectations: Performance was below standard with regard to the expectations and the requirements of the position. Steps must be taken to improve overall performance.

Staff Member is on formal performance plan.



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## OVERALL COMMENTS

### Manager Comments

### Staff Member Comments [?](#)

**B** *I* U

### Comments:

Overall Comments

Make any overall comments as necessary.

### Saving & Closing the form:

- Click **Save Draft** to come back and complete the form at a later time.
- Click **Save & Release to Your Manger** to allow your manager to see the form.
- Click **Print Draft** to print a draft of the appraisal

SAVE DRAFT

SAVE & RELEASE TO YOUR MANAGER

PRINT DRAFT



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### Other Features:

The far left column of the home page provides two buttons for the appraisal.

Use the trash icon to delete the appraisal.

Use the arrow icon to transfer the appraisal to a different manager.



### Transfers:

If your manager changes, it's necessary for you to transfer your appraisal, complete or not, to your new manager.

Click the transfer button to start this process.







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Annual Performance Appraisal Form

John Joseph Budner, ([Logout](#))

**Transfer this appraisal: John Budner**

Please enter the UNI of the manager you would like to transfer this appraisal to.

Manager's UNI:

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### Transfers:

Enter the UNI of the new manager and click Transfer.

The staff person and the new manager will both receive emails notifying them of the transfer.



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**Process for Using the Form for Final Appraisal at End of Review Cycle**

1. Manager conducts meeting(s) to have conversation with staff members about performance on previously stated goals.
2. Manager logs in and completes one Performance Appraisal for each staff member following instructions on pages 1-4 of this job aid.
  - a. OR staff logs in and completes their own appraisal and releases it to the manager for review.
3. When manager is finished with the appraisal and has had all necessary conversations with staff, he/she releases appraisal for review to staff member.  
**PLEASE NOTE:** It is not required to assign a final overall performance rating at this stage.
4. Staff member receives an automatic email stating that their review is available for commentary.
5. Staff member uses link in email to log in to their appraisal, reviews and makes any necessary comments or changes.
6. Staff member can save draft or release back to the manager for final review.
7. When released back to the manager, the manager receives an email indicating staff has released the appraisal back for their final review.
8. Manager logs in to finalize the appraisal and assign a final performance rating.
9. Manager clicks finalize and print and prints the appraisal.
10. Manager signs the appraisal.
11. Staff member signs the appraisal.
12. If needed, Senior level signature and one "Other" signature lines are available. (for example HR)
13. Manager files paper copy of appraisal.

**Process for Using the Form for Goal Setting at Beginning of Review Cycle**

1. Manager meets with staff members to discuss goals for the year.
2. Manager has option to share the Performance Goals Job Aid Staff for Staff with staff members to have them start to write performance goals. (See CUHR website for job aid)
3. After all necessary conversations, manager or staff logs in using the steps on page one and completes the first two columns in the goals section.