



NASDA Performance Review

(Manager and Supervisor Instructions)



Welcome to NASDA's New Performance Review System!

NASDA is very excited to implement an online tool to manage all performance reviews through iSolved. There are couple of upgrades we have made to the old evaluation process.

New Metric Rating

- 1) Unsatisfactory
- 2) Needs Improvement
- 3) Effective
- 4) Highly Effective
- 5) Exceptional

Additional Categories

- 1) Job knowledge
- 2) Quality of Work
- 3) Accountability
- 4) Motivation
- 5) Teamwork
- 6) Communication

Please visit the NASDA NASS website [Personnel Resources > Handbooks](#) to view a list of training materials

Videos

- 1) NASDA Performance Review (Manager and Supervisor Tutorial)
- 2) NASDA Enumerator Acknowledging and Signing Performance Evaluation Tutorial
- 3) How to Evaluate NASDA Employees Tutorial

Written Instructions

- 1) NASDA Performance Review (Manager and Supervisor Instructions)
- 2) NASDA Enumerator Acknowledging and Signing Performance Evaluation Instructions
- 3) NASDA Metric Rating Handout

Step 1:

Log into iSolved and switch to **Manager** or **Supervisor View**

The screenshot displays the iSolved Human Capital Management interface. At the top left, the logo 'iSolved' is followed by 'Human Capital Management' and 'Delivered by Payroll Network'. The user is logged in as 'Test Supervisor' for 'Client: 1500 - NASDA'. A dropdown menu is open, showing 'Employee View' and 'Supervisor View' (which is selected with a checkmark). Other menu items include 'Home', 'My Account', 'University', 'Logout', and 'Performance Reviews'. The main dashboard area is titled 'My Dashboard' and contains an 'Options' section with links for 'Pending Transactions', 'Alert Monitoring', 'Employee Punch Status', and 'Earnings Summary of Hours'. On the right, two status messages are shown: 'You have No Pending Time Off Requests' and 'You have No Pending Transactions', both with green checkmarks.

Step 2:

Under **EMPLOYEE MANAGEMENT**, select **Performance Reviews**

The screenshot displays the iSolved Human Capital Management interface. At the top, the logo "iSolved" is followed by "Human Capital Management" and "Delivered by Payroll Network". Below this is a navigation bar with "Test Supervisor" and a client identifier "Client: 1500 - NASDA". A search bar is present with the text "Search the menu". The main navigation menu is highlighted in orange and includes "EMPLOYEE MANAGEMENT". Under this menu, several options are listed: "New Hire Wizard", "Quick Hire", "Employee Maintenance >", "Initiate New Hire Onboarding", "Pending New Hires Dashboard", "Performance Reviews <" (highlighted with a red box), "Schedule Review", "Add Review", and "Review History". On the right side, the "My Dashboard" section is visible, containing an "Options" header and a list of items: "Pending Transactions" (highlighted in orange), "Alert Monitoring", "Employee Punch Status", and "Earnings Summary of Hours".

iSolved | Human Capital Management Delivered by Payroll Network

Test Supervisor

Client: 1500 - NASDA

Search the menu

EMPLOYEE MANAGEMENT

- New Hire Wizard
- Quick Hire
- Employee Maintenance >
- Initiate New Hire Onboarding
- Pending New Hires Dashboard
- Performance Reviews <**
- Schedule Review
- Add Review
- Review History

My Dashboard

Options

- Pending Transactions**
- Alert Monitoring
- Employee Punch Status
- Earnings Summary of Hours

Step 3:

Initiate a Review

There are two options to initiate a review:

1) Add Review

This option is used to schedule and complete a review right away. Managers and Supervisors should use this option if they did not schedule the review prior to the review date. **(We will review this process first)**

OR


2) Schedule Review


This option allows the Manager or Supervisor to schedule a review ahead of time and complete at a later date.

Add Review: Step 4

Under Performance Reviews, select **Add Review**. This will bring up an employee list. **Select an employee** to begin the review.

iSolved Human Capital Management Delivered by Payroll Network

Test Supervisor 

Company: ALL | Pay Group: | Org Category: ALL | Value: | Status: Active | Employee Type: ALL | Search: 

Employee List

Company	Pay Group	Employee #	First
National Association of State Departments of Agriculture	1515 - Hawaii	20274	Test
National Association of State Departments of Agriculture	1515 - Hawaii	153189253	TEST

EMPLOYEE MANAGEMENT

- New Hire Wizard
- Quick Hire
- Employee Maintenance >
- Initiate New Hire Onboarding
- Pending New Hires Dashboard
- Performance Reviews <
 - Schedule Review
 - Add Review**

Add Review: Step 5

- Enter the **Review Date**
- If desired, enter the **Next Review Date**, **Period Start Date**, and **Period End Date** (optional)
- Select the **Review Type** (Annual or Survey Review)
- Select **Review** (Field Enumerator, Field Supervisor, Office Enumerator, Office Supervisor, or Coach)
- Click **NEXT** when all required fields have been entered or selected.

Search the menu

EMPLOYEE MANAGEMENT

- New Hire Wizard
- Quick Hire
- Employee Maintenance >
- Initiate New Hire Onboarding
- Pending New Hires Dashboard
- Performance Reviews <
- Schedule Review
- Add Review**
- Review History

Add Review

→ Next

Review

Use this screen to add and complete a review that was not previously scheduled

* Review Date: 6/27/2017

Next Review Date:

Period Start Date:

Period End Date:

* Review Type:

* Review:

Add Review: Step 6

- You can now begin completing each question in the evaluation. Some questions require only a typed answer in the **Comments** section.
- To move from one question to the next, click **NEXT**
- To move to a previous question, click **Previous**

Performance Review History

← Previous → Next 🖨 View

If survey evaluation please note survey name.

Comments:

Add Review: Step 7

- For questions requiring a rating, use the drop menu to select the appropriate **RATING**
- Add **Comments** in the comment box to support any rating you give an Enumerator or Supervisor
- Click **NEXT** to move to the next question

Add Review

← Previous → Next 🖨 View

TRAINING PERFORMANCE 1. Home study 2. Attended training 3. Participated in training

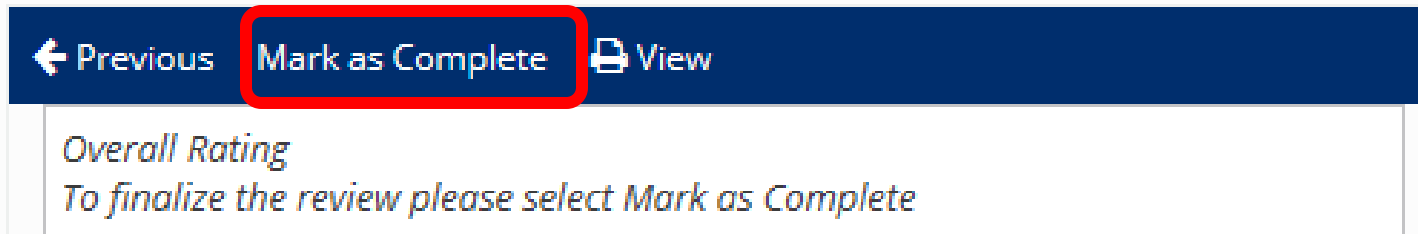
Rating:
Comments:

Unsatisfactory - 5
Needs Improvement - 10
Effective - 15
Highly Effective - 20
Exceptional - 30

Add Review: Step 8

- After all questions have been answered, finalize the review by clicking the **Mark as Complete** button.
- You can also click **View** which will give you a PDF version of the performance evaluation.

Performance Review History



- After the Mark as Complete button has been clicked, an email alerting the Enumerator to sign and acknowledge the evaluation will be sent.

Schedule Review: Step 4

Under **Performance Review**, select **Schedule Review**. This will bring up a list of employees. Select an employee under **Employee List** to schedule a review.

The screenshot displays a web application interface for managing performance reviews. On the left is a navigation menu with the following items: 'Test Supervisor', 'Search the menu', 'EMPLOYEE MANAGEMENT', 'New Hire Wizard', 'Quick Hire', 'Employee Maintenance >', 'Initiate New Hire Onboarding', 'Pending New Hires Dashboard', 'Performance Reviews <', 'Schedule Review' (highlighted), 'Add Review', and 'Review History'. The main content area features a filter bar with dropdown menus for 'Company' (set to 'ALL'), 'Pay Group', 'Org Category' (set to 'ALL'), 'Value', 'Status' (set to 'Active'), and 'Employee Type' (set to 'ALL'). There is also a search input field and 'Apply' and 'Reset' buttons. Below the filter bar is the 'Employee List' section, which contains a table with the following data:

Company	Pay Group	Employee #	First Name	Middle Name
National Association of State Departments of Agriculture	1515 - Hawaii	20274	Test	
National Association of State Departments of Agriculture	1515 - Hawaii	153189253	TEST	

Schedule Review: Step 5

- Enter the **Review Date**
- Enter the **Next Review Date**
- If desired, enter the **Period Start Date**, and **Period End Date** (optional)
- Select the **Review Type** (Annual or Survey Review)
- Select **Review** (Field Enumerator, Field Supervisor, Office Enumerator, Office Supervisor, or Coach)
- Click **SAVE** when all required fields have been entered or selected.

The screenshot shows a web application interface for scheduling a review. On the left is a navigation menu with the following items: "Performance Reviews <", "Schedule Review" (highlighted in orange), "Add Review", and "Review History". The main content area has a dark blue header bar with icons and labels for "Add New", "Edit", "Refresh", "Save", "Cancel", and "Print". Below this is a section titled "Review" with a light gray box containing the instruction: "Use this screen to schedule a review that will be available on the ESS pending reviews screen for completion". The form fields are: "* Review Date:" with a text input containing "6/26/2017" and a calendar icon; "Next Review Date:" with an empty text input and a calendar icon; "Period Start Date:" with an empty text input and a calendar icon; "Period End Date:" with an empty text input and a calendar icon; "* Review Type:" with a dropdown menu; and "* Review:" with a dropdown menu.

Schedule Review: Step 6

- Under **EMPLOYEE SELF SERVICE** select the **Performance Review History** tab
- Select the specific review for the employee that was scheduled, click **START** to complete an evaluation. Click **View** to view an evaluation.

The screenshot shows the 'Performance Review History' page for 'Test Employee'. The page header includes employee details: Employee#: 20274, Status: Active, Pay Group: 1515 - Hawaii, Hire Date: 7/1/2016, 1099: ####.##, Work Location: Hawaii, Project Code, Department, Enumerator Hours, and Supervisor Hours. The left sidebar shows 'EMPLOYEE SELF SERVICE' as the active section. The main content area has a 'Start' button and a 'View' button, both highlighted with a red box. Below the buttons is a table with columns: Scheduled Review Date, Review Type, Review Period, Reviewer, Date Completed, and Status. A single row is visible with the following data:

Scheduled Review Date	Review Type	Review Period	Reviewer	Date Completed	Status
6/26/2017	NASDA Enumerator, Supervisor, Coach Annual Review		Test Supervisor		Not Started

- After you have clicked **START**, click **NEXT**

The screenshot shows the details of a specific performance review. The page title is 'Performance Review History'. The navigation bar includes 'Previous', 'Next', and 'View' buttons, with 'Next' highlighted by a red box. The review details are as follows:

- Review Date: 6/26/2017
- Period Start Date:
- Period End Date:
- Review Type: NASDA Enumerator, Supervisor, Coach Annual Review
- Review: NAS-008 NASDA Field Enumerator Performance Eval
- Reviewer: Test Supervisor

Schedule Review: Step 7

- You can now begin completing each question in the evaluation. Some questions require only a typed answer in the **Comments** section.
- To move from one question to the next, click **NEXT**
- To move to a previous question click, **Previous**

Performance Review History

← Previous → Next View

If survey evaluation, please note survey name.

Comments:

Schedule Review: Step 8

- For questions requiring a rating, use the drop menu to select the appropriate **RATING**
- Add **Comments** in the comment box to support any rating you give an Enumerator or Supervisor
- Click **NEXT** to move to the next question

Add Review

← Previous → Next 🖨 View

TRAINING PERFORMANCE 1. Home study 2. Attended training 3. Participated in training

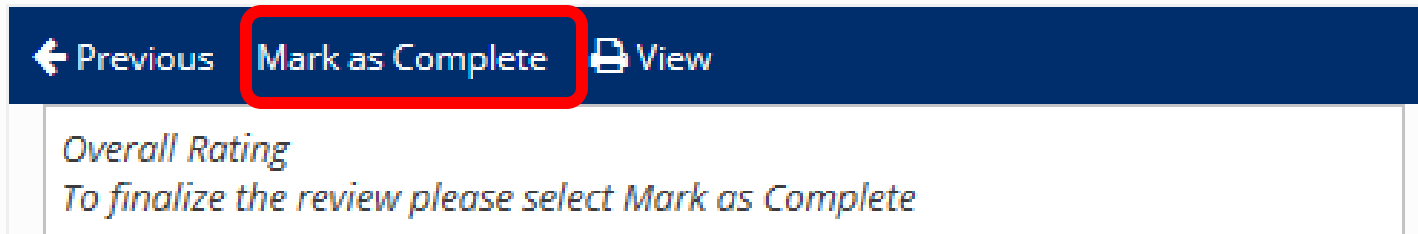
Rating:
Comments:

Unsatisfactory - 5
Needs Improvement - 10
Effective - 15
Highly Effective - 20
Exceptional - 30

Schedule Review: Step 9

- After all questions have been answered, finalize the review by clicking the **Mark as Complete** button.
- You can also click **View** which will give you a PDF version of the performance evaluation.

Performance Review History



- After the Mark as Complete button has been clicked, an email alerting the Enumerator to sign and acknowledge the evaluation will be sent.

Performance Review Reports

- **Performance Reviews Completed (Date Range)**
 - Displays employees that have completed performance reviews.
- **Performance Reviews Scheduled (Date Range)**
 - Displays employees that have performance reviews schedule
- **Performance Review Past Due (Date Range)**
 - Displays employees who have scheduled performance reviews that are past due
- To access the reports **REPORTING>CLIENT REPORTS**

Client Reports

Report Category:
Search:

Output Name	Report Type
Performance Review Past Due	Date Range
Performance Reviews Completed	Date Range
Performance Reviews Scheduled	Date Range

[Generate Report](#) [Go To My Reports Queue](#)

Once your report request has been submitted you can do My Reports Queue for 72 hours.

Performance Review Past Due

Filtering