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

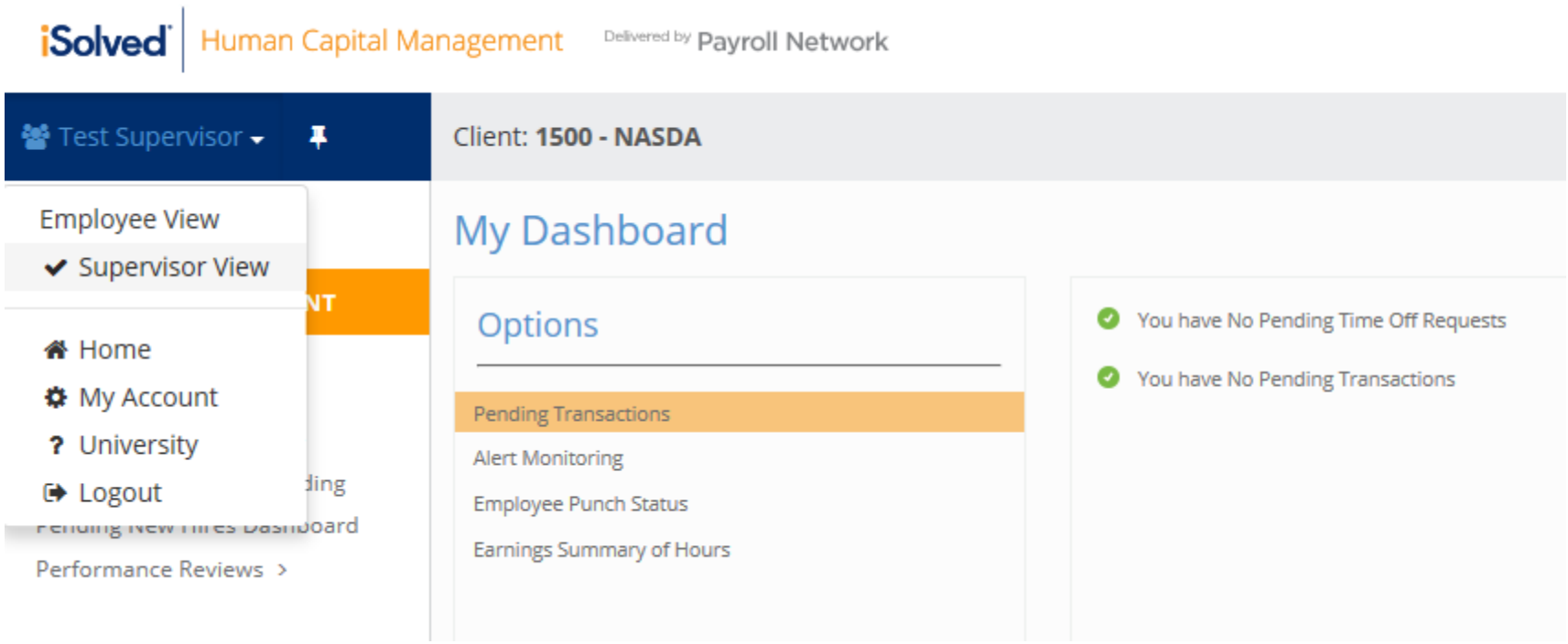
1) NASDA Performance Review (Manager and Supervisor Tutorial)
2) NASDA Enumerator Acknowledging and Signing Performance Evaluation Tutorial
3) How to Evaluate NASDA Employees Tutorial

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**



Step 2:

Under **EMPLOYEE MANAGEMENT**, select **Human Resources, then Performance**

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)**

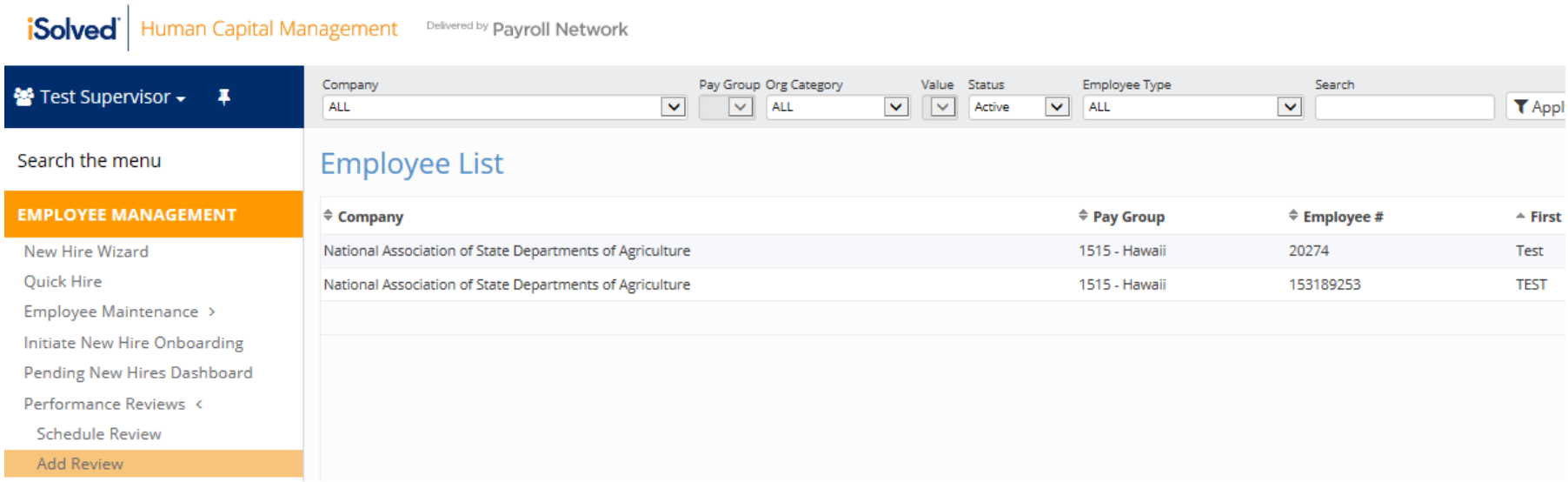
OR

2) **Schedule Review**

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

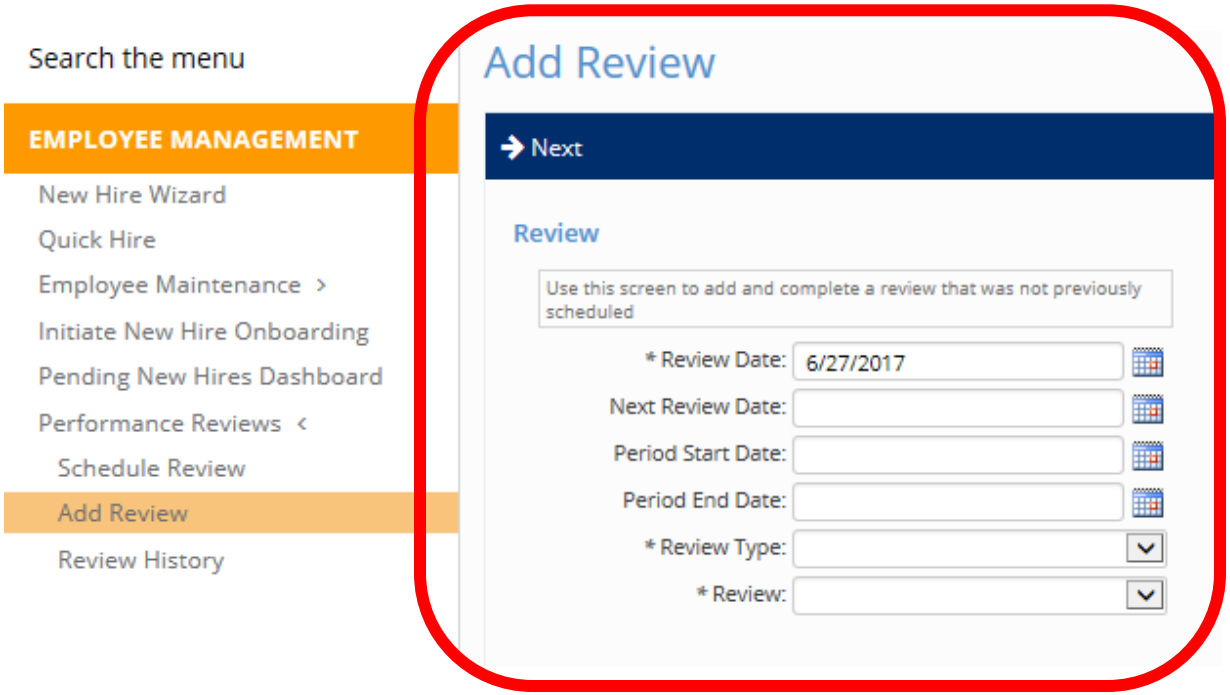
Add Review: Step 4

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



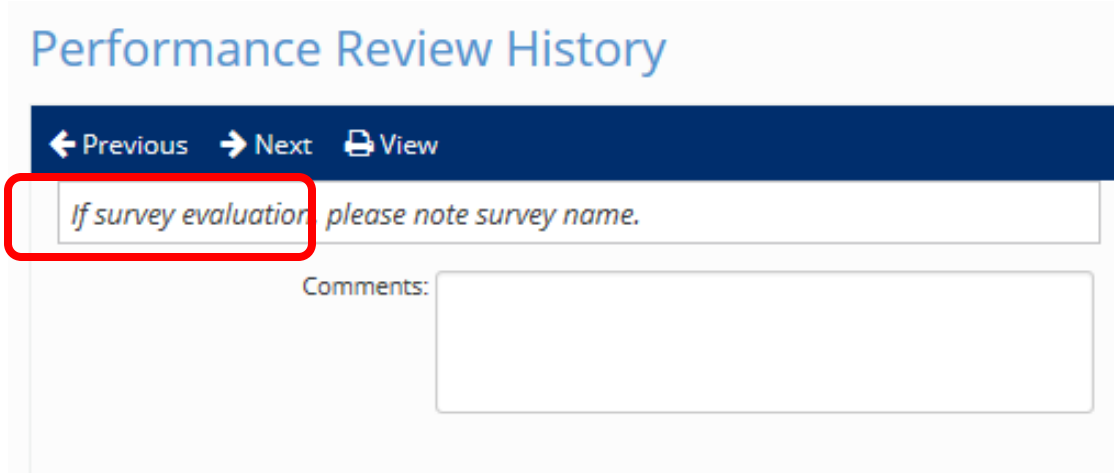
Add Review: Step 5

- 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.



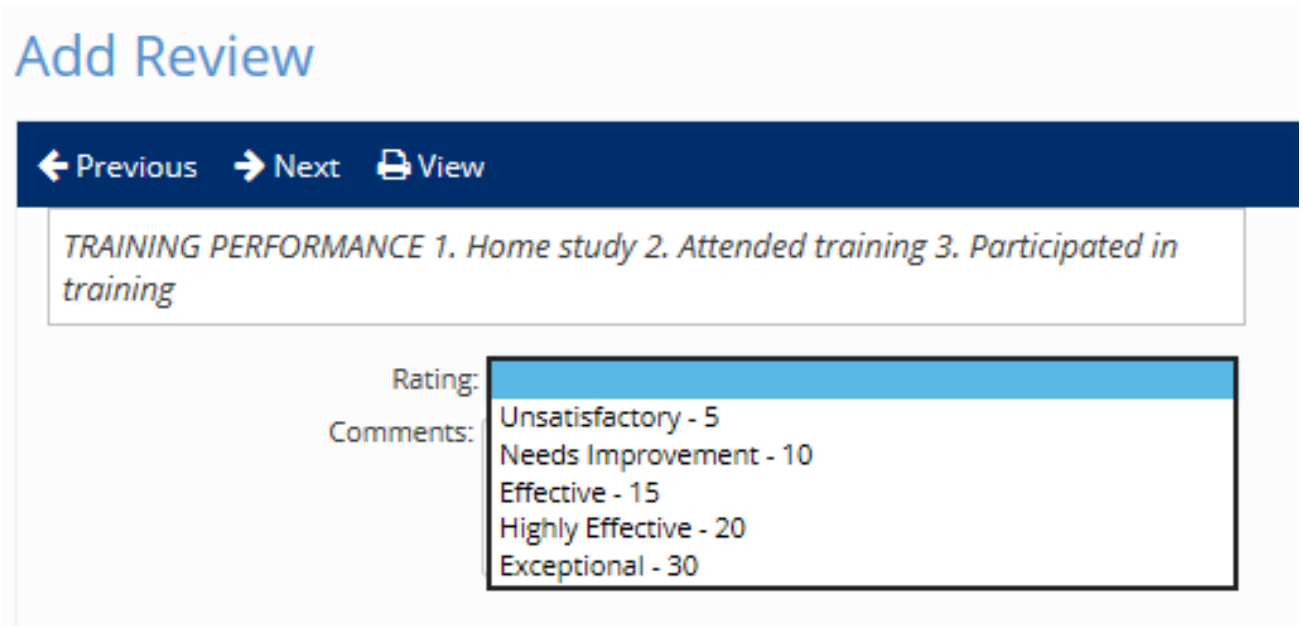
Add Review: Step 6

- 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**



Add Review: Step 7

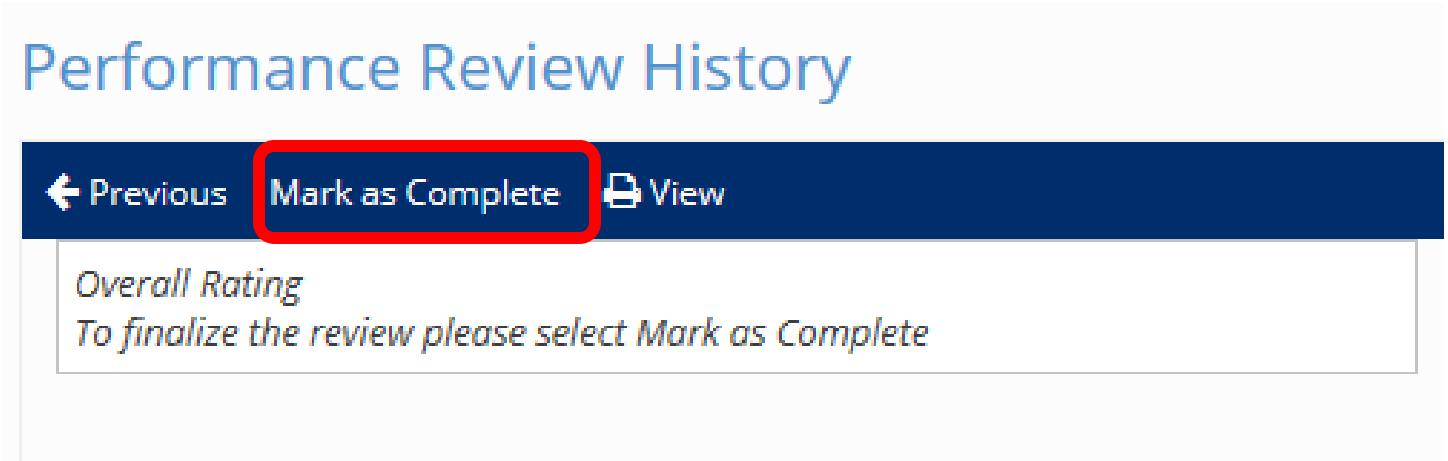
- For questions requiring a rating, use the drop menu to select the appropriate **RATING**
- Add **Comments** in the comment box to support any rating you give an Enumerator or Supervisor
- Click **NEXT** to move to the next question



Add Review: Step 8

- After all questions have been answered, finalize the review by clicking the **Mark as Complete** button.

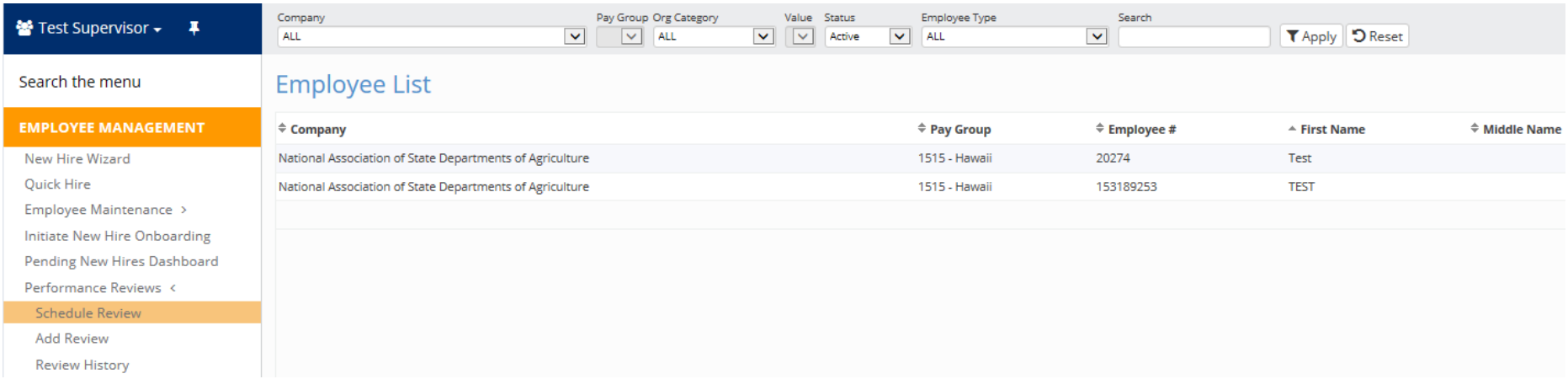
- You can also click **View** which will give you a PDF version of the performance evaluation.



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

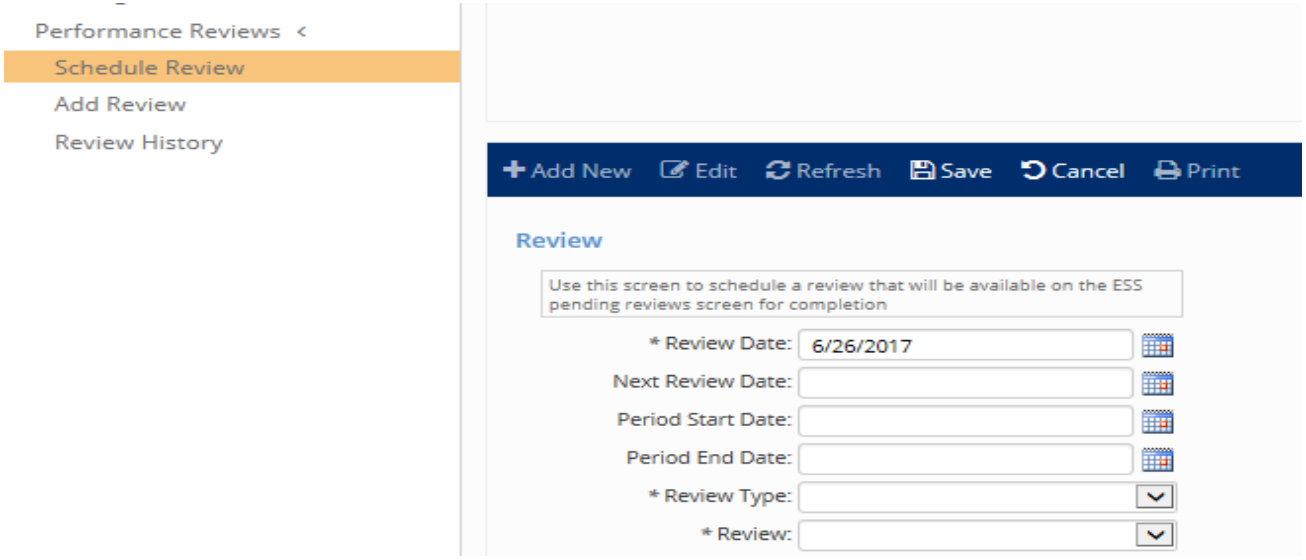
Schedule Review: Step 4

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



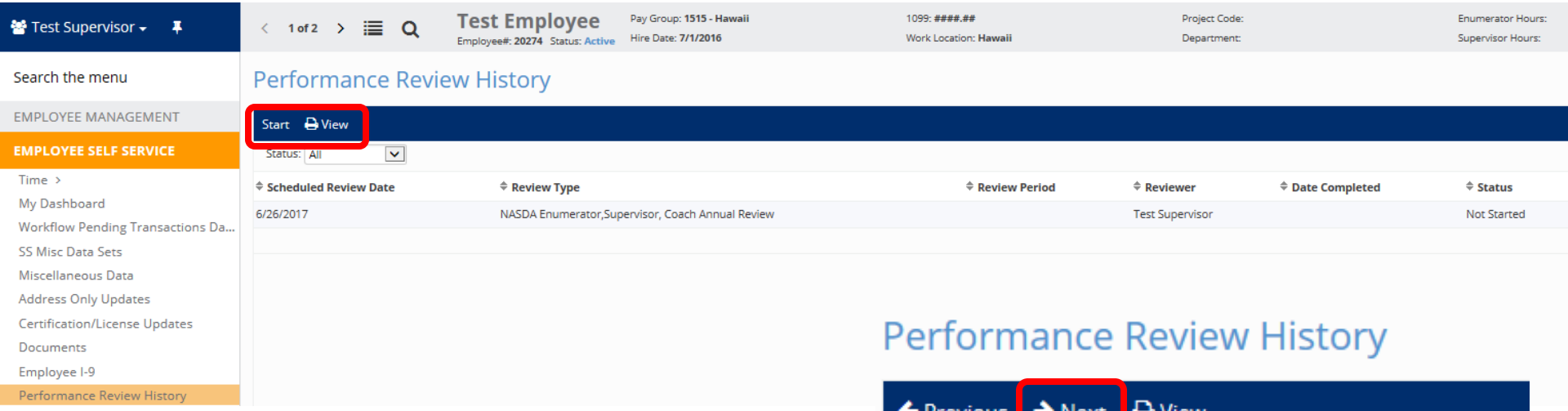
Schedule Review: Step 5

- 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.



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.



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

Schedule Review: Step 7

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- To move from one question to the next, click **NEXT**
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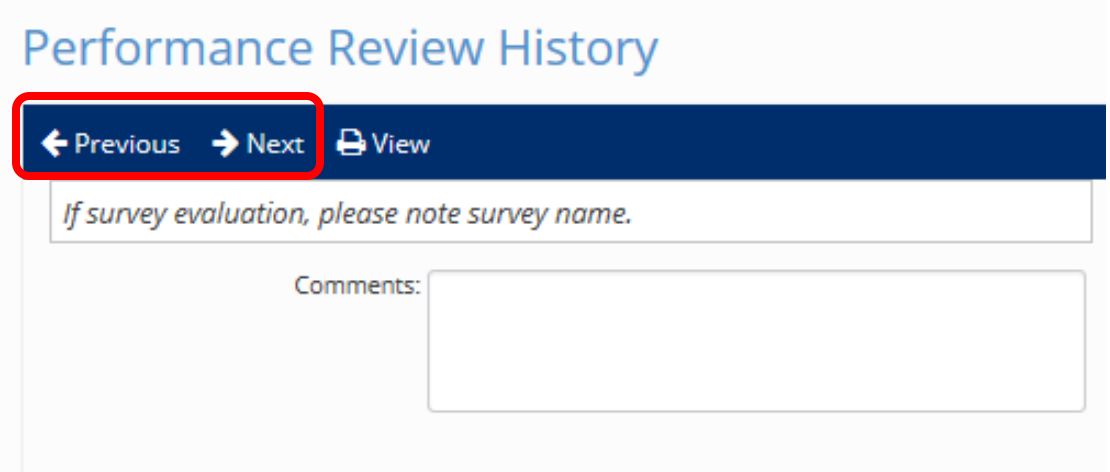
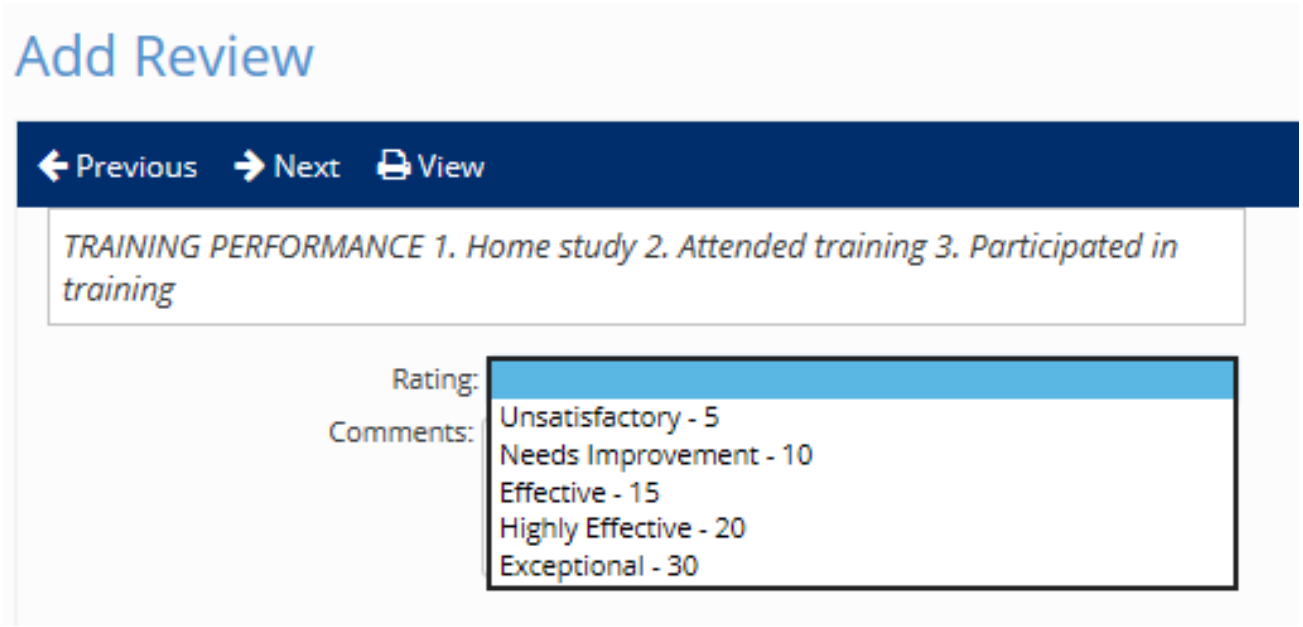


Schedule Review: Step 8

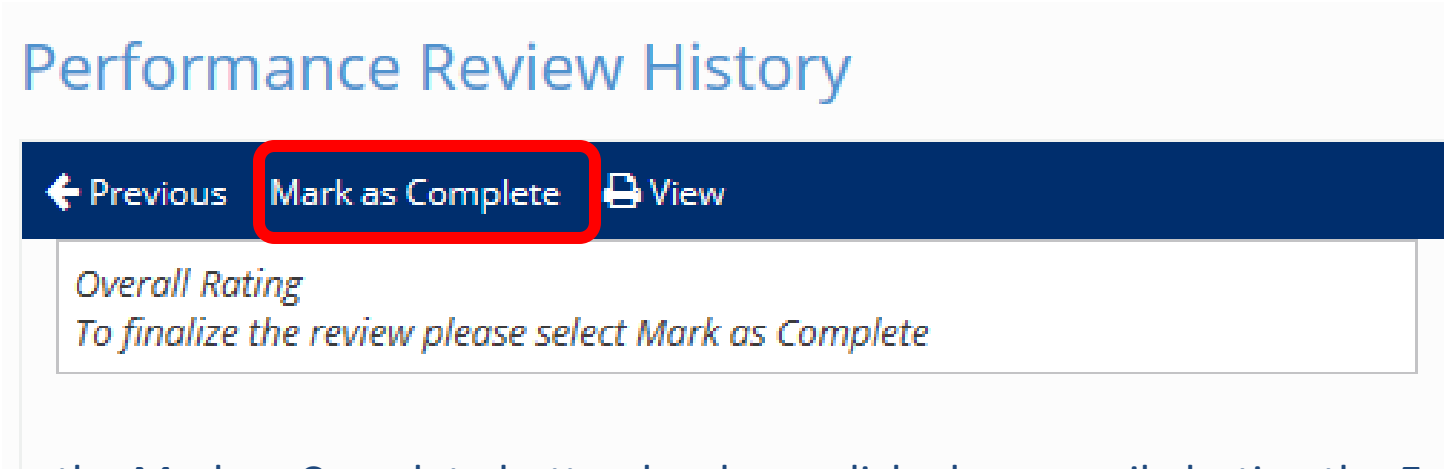
- For questions requiring a rating, use the drop menu to select the appropriate **RATING**
- Add **Comments** in the comment box to support any rating you give an Enumerator or Supervisor
- Click **NEXT** to move to the next question



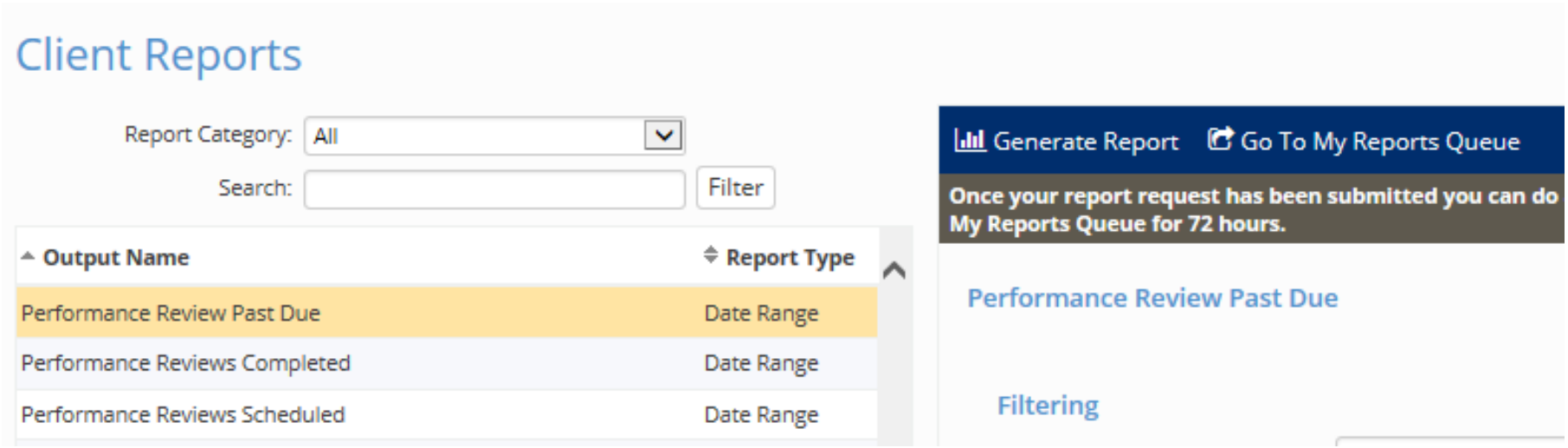
Schedule Review: Step 9

- 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.



- 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**