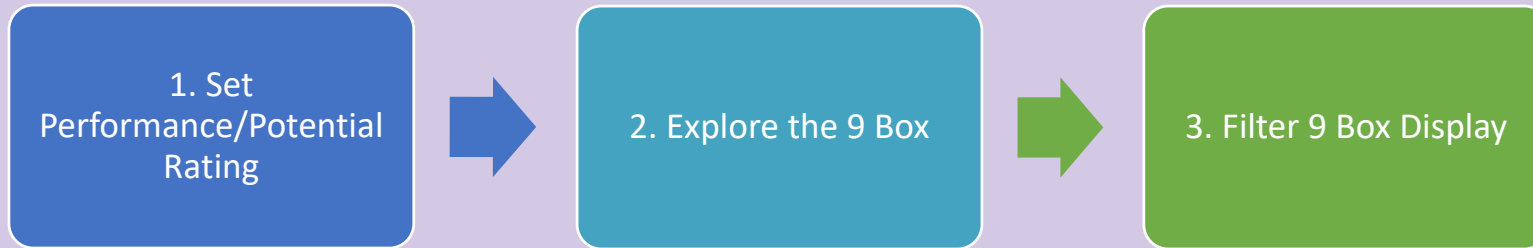


# Employee Potential/Performance Ratings and 9 Box

These high-level steps show what is required to manually set an employee's Overall Potential and Performance Score and view Potential and Performance Ratings within the 9 Box. Each step includes sub-steps.



## Navigation:

- Use the **Page Down** key to proceed through the quick steps.
- Use the **Page Up** key to return to a prior slide.

Dashboard

MY EMPLOYEES

RECRUITING

PERFORMANCE

LEARNING

SUCCESSION

CAREER CENTER

REPORTS

Employees Search...

Main Dashboard

Get More WidgetsTasks

Click MY EMPLOYEES.

LA Mars Admin

Show All

v16.1.0  
Last sync:

1. Set Performance and Potential Rating > Step A

## Main Dashboard

Get More Widgets

B

Click **My Employees**.

sy LALA) Mars Admin

\*

## REPORTS

v16.1.0  
Last sync:

## 1. Set Performance and Potential Rating > Step B

My Employees

Employees


Search...

My Employees / My Employees

My Employees


Performance

<< 1 >>



Kathryn Admin  
KC - Site Administrator  
PB:  
Creative Front Office  
KC - Creative Main Office

APPRAISALS	CURRENT PHASE	SCORE	PHASE END DATE
★ Mars w/ full 2 Approvals	Planning	Incomplete	
( 360 )	Planning	Incomplete	N/A
( 360 )	Planning	Incomplete	N/A



Reine Admin  
PB:  
Accounting / Finance  
RT Hotel 5\*

Development

Learning

Displaying 1 - 5 of 5 10 25 50 100 per page

Expand

Expand

Depending on how the Performance module is configured, 9 Box Performance scores are pulled from Appraisal scores or from a manual score assigned from within the My Employees screen. We'll demonstrate how a manager manually assigns both the Potential and Performance scores.

- **Potential Score:** Designates the employee's overall potential within the company, and speaks to the employee's ability to take on his/her job.
- **Performance Score:** Rates the employee's work performance over a specified period of time based on specific goals and metrics.

C Click the **More Options** icon for the employee whose Potential Rating you are setting.

< Main Menu

MY EMPLOYEES

My Employees

My Matrix Employees

9 Box

Project Teams

Certifications

My Employees

Employees

Search...

My Employees / My Employees

My Employees

Performance

<< < 1 > >>

Showing 1 - 5 of 5102550100 per page

DevelopmentLearning

Kathryn Admin

KC - Site Administrator

PB:

Creative Front Office

KC - Creative Main Office

No appraisals for this employee.

Reine Admin

Accounting / Finance

RT Hotel 5\*

APPRAISALS	CURRENT PHASE	SCORE	PHASE END DATE
★ Mars w/ full 2 Approvals	Planning	Incomplete	
( 360 )	Planning	Incomplete	N/A
( 360 )	Planning	Incomplete	N/A

ACTIONS

+ Add Career Path

+ Add Development Plan

Drill Down

Nominate for Succession Plan

View 9 Box

View TTP

Set Performance/Potential Rating

Click Set Performance/Potential Rating.

Deltek Talent Management - Direct Reports - Google Chrome

docenhancement.awsqa.hua.hrsmart.com/user\_potential\_rating.php?noheader=1&hua\_user\_id=56

### Set Performance/Potential Rating

Admin, Kathryn

#### Potential

YOUR RATING \*

- ☐ 1 - Poor
- ☐ 2 - Below Average
- ☐ 3 - Average
- ☒ 4 - Above Average
- ☐ 5 - Excellent

Often exceeds expectations.

#### Performance Score

YOUR RATING \*

- ☐ 1 - Poor
- ☐ 2 - Below Average
- ☒ 3 - Average
- ☐ 4 - Above Average
- ☐ 5 - Excellent

Usually meets expectations.

#### SENIORITY

Years

#### NEXT ACTION

- In Position
- Select --
- In Position
- Lateral Move
- Promotion
- Termination

F

Select a rating that indicates how the employee has performed based on specific goals and performance expectations.

E

Select an option that best expresses the value of the employee's potential towards growth and development.

G

You can also select the probable next action for this employee's career based on potential.

Deltek Talent Management - Direct Reports - Google Chrome

docenhancement.awsqa.hua.hrsmart.com/user\_potential\_rating.php?noheader=1&hua\_user\_id=56

## Set Performance/Potential Rating

Admin, Kathryn

### Potential

YOUR RATING \*

☐ 1 - Poor  
☐ 2 - Below Average  
☐ 3 - Average  
☒ 4 - Above Average  
☐ 5 - Excellent

Often exceeds expectations.

### Performance Score

YOUR RATING \*

☐ 1 - Poor  
☐ 2 - Below Average  
☐ 3 - Average  
☒ 4 - Above Average  
☐ 5 - Excellent

Often exceeds expectations.

SENIORITY

Years

NEXT ACTION

Promotion

RISK OF LOSS

Low

-- Select --

Low

Medium

High

Save

Cancel

Eepito Administrator

Potential: Unrated

Time in Position: N/A

H You can update the Risk of Loss, which is your estimate of the probability the employee will leave the company.

I When finished, click **Save**.

Dashboard

**MY EMPLOYEES**

RECRUITING

PERFORMANCE

LEARNING

SUCCESSION

CAREER CENTER

REPORTS

Employees Search...

Main Dashboard

Get More WidgetsTasks

ts (10)

Score this Appraisal - Appraisal (Mars WF Easy LALA) Mars Admin

Show All

v16.1.0  
Last sync:

A

Click **MY EMPLOYEES**.



## Main Dashboard

Get More Widgets

## Alerts

Assistance Requests (10)

✕

B

Click **9 Box**.

□

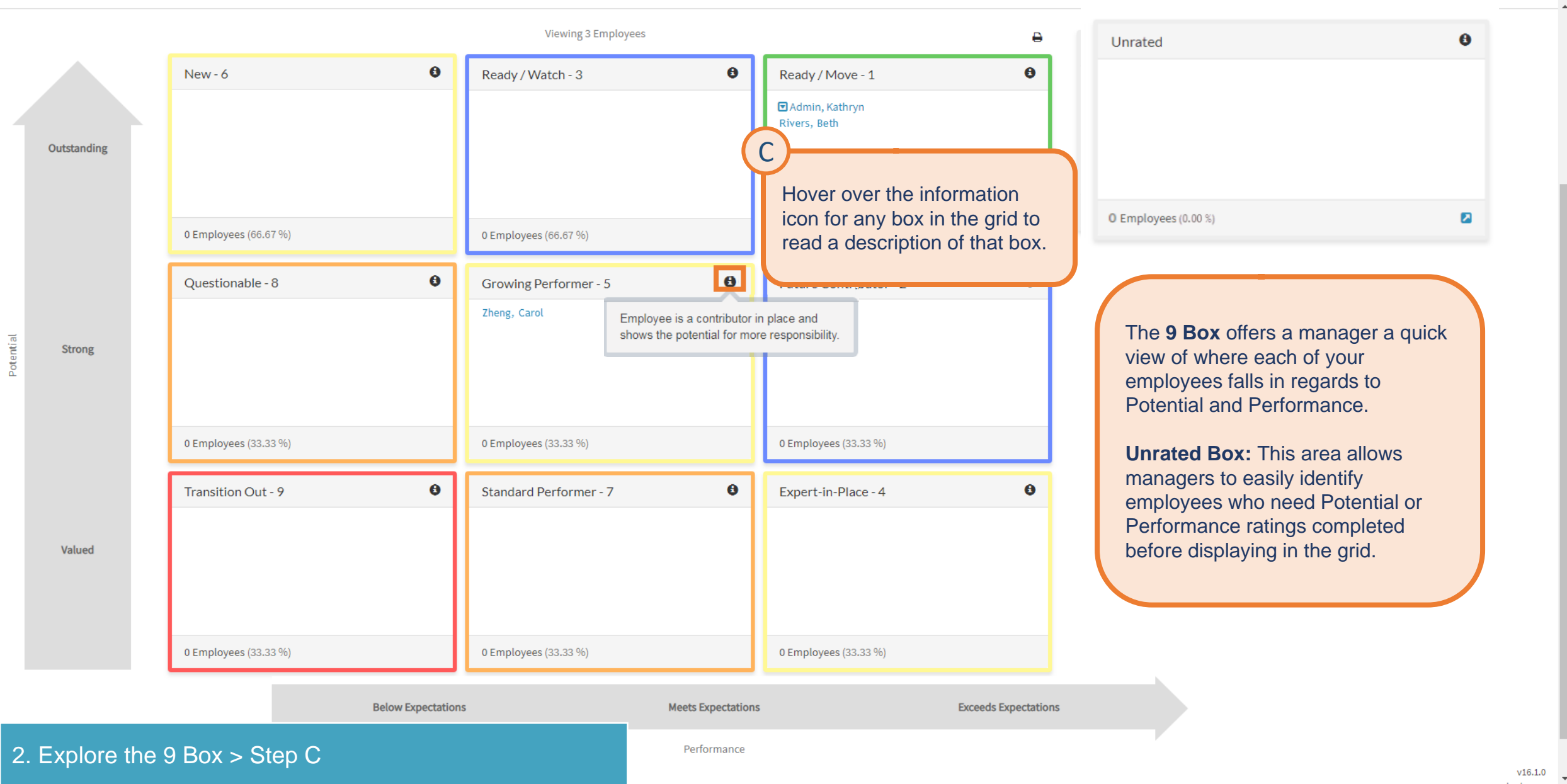
v16.1.0  
Last sync:

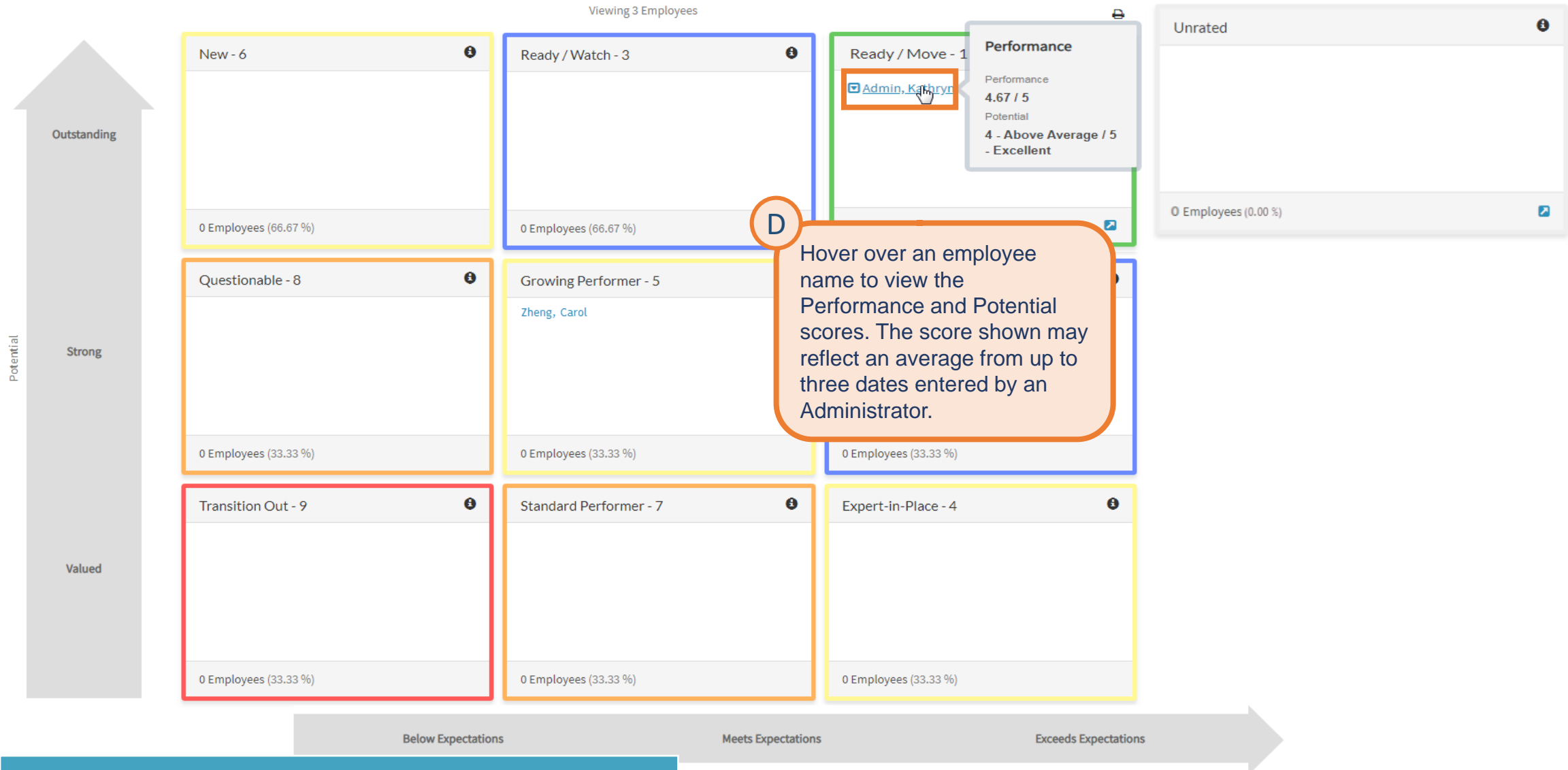
## SUCCESSION

## CAREER CENTER

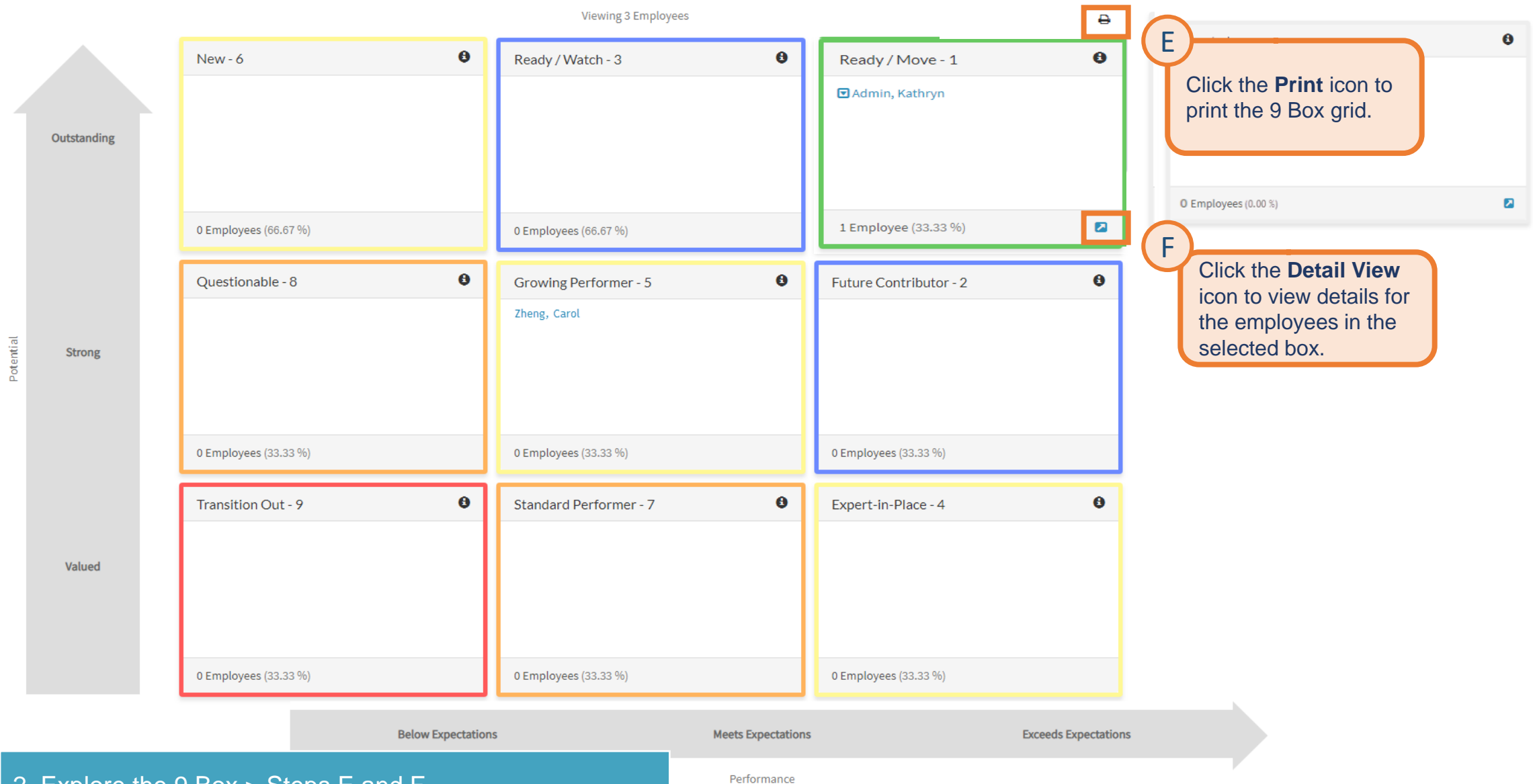
## REPORTS

## 2. Explore the 9 Box > Step B





## 2. Explore the 9 Box > Step D



## 2. Explore the 9 Box > Steps E and F

My Employees / 9 Box

9 Box - Employee Detail

Ready / Move

Employee performs at the highest levels and possesses the abilities to step into a more advanced role.

EMPLOYEE NAME	MANAGER NAME	JOB TITLE	PERFORMANCE	PERFORMANCE LAST UPDATED	POTENTIAL	POTENTIAL LAST UPDATED	RISK OF LOSS	DIVERSITY	START DATE	END DATE
Admin, Kathryn	HRsmart, Admin	KC - Site Administrator	4.67	10/17/2019	4 - Above Average / 5 - Excellent	10/17/2019	Medium	<ul style="list-style-type: none"><li>Race - White (not Hispanic or Latino)</li><li>Gender - Female</li><li>Disabled - No</li></ul>	6/19/2006	6/22/2009

G

Clicking the Detail View icon opens the Employee Detail screen where you can review details on screen, or select an option to download the information in PDF, CSV, or XLS format.

Viewing Reports For:Admin

Filter

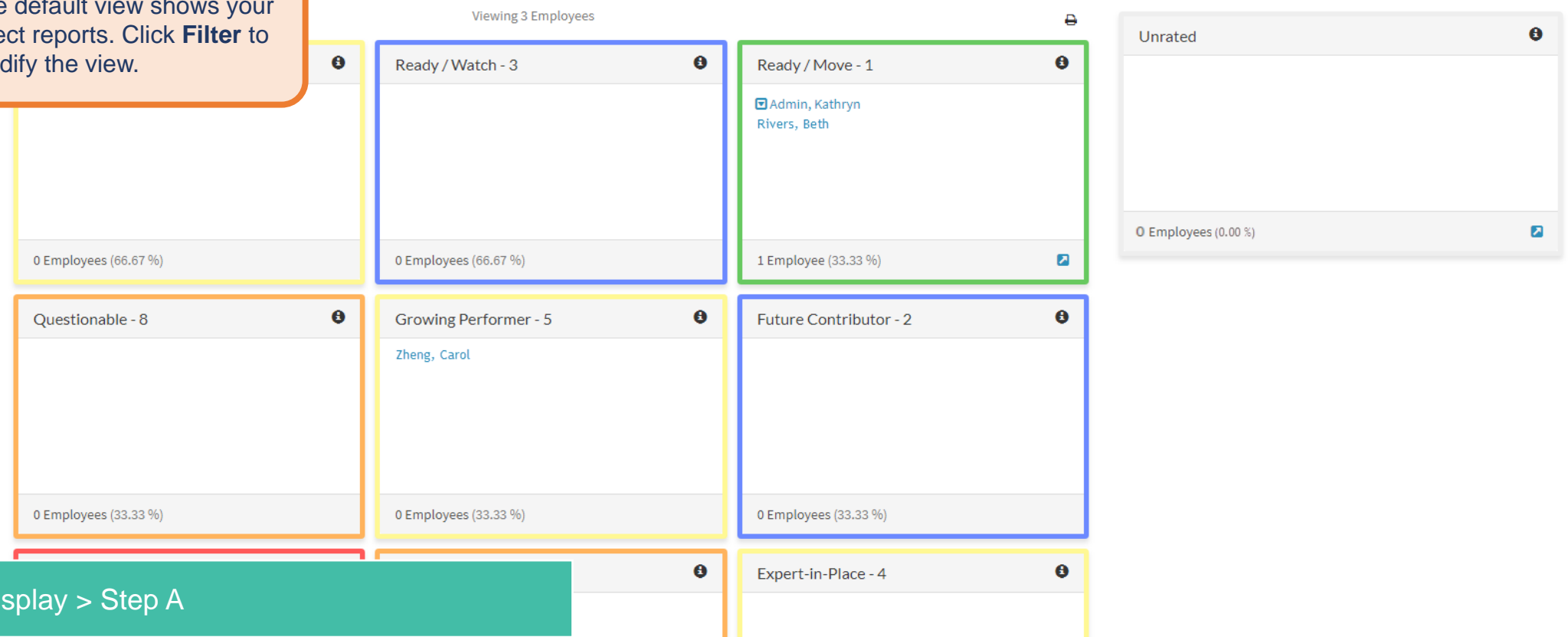
A

The default view shows your direct reports. Click **Filter** to modify the view.

Potential

Outstanding

Strong



SEARCH DATE

SORT

by Score

by Score

Alphabetically

Direct Reports

ATTRITION

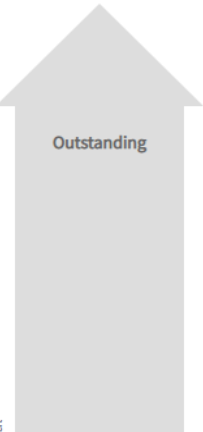
None

B

Specify filter options, as desired:  
**Search Date:** Select a date for your 9 Box view. For example, you can select a past date to view Performance and Potential at that point of time.  
**Sort:** Select to sort **by Score** or **Alphabetically**.

Filter Return to Default View

Viewing 3 Employees



New - 6

0 Employees (66.67 %)

Ready / Watch - 3

0 Employees (66.67 %)

Ready / Move - 1

☒ Admin, Kathryn  
Rivers, Beth

1 Employee (33.33 %)

Unrated

0 Employees (0.00 %)

Questionable - 8

Growing Performer - 5

Zheng, Carol

Future Contributor - 2

SEARCH DATE

SORT

by Score

FILTER BY

Direct Reports

Direct Reports

2nd Level Reports

3rd Level Reports

2nd Level Reports (Cumulative)

3rd Level Reports (Cumulative)

Company / Division

Job Family

Location

Filter

Viewing 3 Employees

**C**

**Filter By:** Select an option to narrow results displayed in the grid. The default view shows Direct Reports. From this field, you can select **2<sup>nd</sup> Level Reports** (the direct reports of your employees), or **3<sup>rd</sup> Level Reports** (the direct reports of the employees of your direct reports). You can also choose to select one of the Cumulative options to show all employees through the level specified (2<sup>nd</sup> or 3<sup>rd</sup>).

al

Outstanding

New - 6	Ready / Watch - 3	Ready / Move - 1	Unrated
		<div>Admin, Kathryn Rivers, Beth</div>	
0 Employees (66.67 %)	0 Employees (66.67 %)	1 Employee (33.33 %)	0 Employees (0.00 %)
Questionable - 8	Growing Performer - 5	Future Contributor - 2	
	Zheng, Carol		

3. Filter the Display > Step C



SEARCH DATE

SORT

by Score

FILTER BY

Direct Reports

D

**Attrition:** Use this option to determine if employees you lost through attrition (voluntary, involuntary, retirement, or any), were high performers.

ATTRITION

None

None

Voluntary

Involuntary

Retirement

Any

Filter Return to Default View

E

Click **Filter** when finished.

Outstanding

Viewing 3 Employees

New - 6

0 Employees (66.67 %)

Ready / Watch - 3

0 Employees (66.67 %)

Questionable - 8

Growing Performer - 5

Zheng, Carol

Future Contributor - 2

Unrated

0 Employees (0.00 %)

3. Filter the Display > Steps D and E

Viewing Reports For:Admin

Filter

