

Putting BLUE to Work at Washtenaw Community College V 2.0 (2021 Edition)

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Overview

- Introductions
 - Andres
 - Gloria
 - Amy
- Recap Annual Performance Appraisals at Washtenaw Community College
 - Staff Evaluations Pre-2020
 - Staff Evaluations During a Global Pandemic
 - Lessons Learned
- Staff Appraisals 2021 – the reinvention of 2020
- Lessons Learned and Opportunities for 2022

Recap of 2020 Annual Performance Appraisals – WCC's Staff Evaluations



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2020 – Annual Performance Appraisals for Staff Recap

2020 Set-up:

- ❖ Paper staff appraisals to online staff appraisals
 - Drivers: excess capacity, Covid-19, paperless initiative
- ❖ Used 360 evaluation concept – multi-user survey
- ❖ 355 employees in 3 staff groups/classifications with 3 levels of supervisors
- ❖ Single data file – our employees, staff group, and all supervisors
- ❖ Unique and common questions for each staff groups
- ❖ 3 Blue Projects, one for each staff group, and a corresponding report for each project
- ❖ Direct Supervisor rates each Employee, the Employee has questions in response to the Direct Supervisor's rating, the Executive Officer has questions which are the official sign-off
- ❖ Triggers on the questions based on roll of Employee, Supervisor, or Executive Officer for each Subject (Employee)

2020 – Annual Performance Appraisals for Staff Recap

2020 Workflow:

- ❖ Direct Supervisor completes the survey for each Employee, and then has virtual meeting with each Employee
- ❖ Direct Supervisor modifies the date of the Employee FO task using Subject View Management (SVM), allowing the Employee to see the Report and also comment on the review and sign off
 - Report includes both *Submitted* and *Saved* responses
 - Report has automatic update so processes overnight
- ❖ Executive Officer reviews each report, and accesses their portion of each form to sign-off
- ❖ The Blue Dashboard is accessed from a module on Blackboard, our LMS

2020 – Annual Performance Appraisals for Staff Recap

2020 Challenges:

- ❖ First use of a 360 project – was all new to us and timeline to design and test was very tight
- ❖ There were three projects and to troubleshoot, you had to first determine the staff group, and thus the associated project and report – time consuming to support
- ❖ SVM to control access to the forms did not work as we expected – it was cumbersome and confusing
- ❖ Overnight updating of Reports caused confusion
- ❖ All communication was driven by HR's email, and Blue's email functions were not utilized – labor intensive for HR Department and not targeted

2021 Annual Performance Appraisals – Reinvention of Staff Evaluations



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2021 – Annual Performance Appraisals V 2.0

Fast Forward

- ❖ Lessons learned from 2020
- ❖ Six months of reflection, discussion and pondering
- ❖ Continuation of our remote (work-from-home) environment
- ❖ Tree saving passion – online performance appraisals save one-third to one-half of a tree

2021 – Annual Performance Appraisals V 2.0

Audience



338 WCC Employees



All Employees broken down
into 3 Employee Groups
(Classifications)



3 Levels of Supervisors :

1. Direct Supervisor
2. Supervisor II (occasionally)
3. Executive Officer

2021 – Annual Performance Appraisals V 2.0

Scope

Employee Group	Custodial Maintenance	OPT (Office Professionals)	Independent
Employees	70	83	185
Direct Supervisors	8	40	59
Supervisor II	2	7	8
Executive Officer	4	9	18
Total Employees being Appraised: 338			

360 Project Overview: One Project

- Subject Definition
- Single Subject Source
- Four Groups
- Subject filters (datasource is multipurpose)
- Form Fill-Out Tasks

Definition
Editing: PerformanceAppraisal

Info | Organizational Links | Groups | Shared Groups | Filters | Language

Definition Title

PerformanceAppraisal

en ★

Description

en

Type

☒ Subjects
☐ Primary/Secondary Subject Pairings
☐ Primary/Secondary Subject Pairings - Multiple Secondary (Multiple Secondary Pairings)
☐ Data Integrity Gateway (DIG)

Subject Source

WCC-AllEmployees

★ Employees

en ★ (Primary Caption)

Secondary Source

en (Secondary Caption)

Pairing Source

N/A (Primary/Secondary)

Groups				
Results: 1 - 4 of 4 Item(s)				
	Group Name	Privileges	Link Type	Edit
<input type="radio"/>	Direct Supervisors	FO, RV	Link	Edit
<input type="radio"/>	Employee	FO, RV	Link	Edit
<input type="radio"/>	Executive Officers	FO, RV	Link	Edit
<input type="radio"/>	Supervisors II	RV	Link	Edit

360 Project Overview: One Datasource

- Single “User” datasource with all subjects (Employees) and relevant information in one file

OriginalID	First Name	Last Name	Direct Supervisor	Supervisor II	Executive Officer	Org #	JOB5 DESC	Staff Group	Full-time Part-time	Job Level	Job Role
geccleston	Gloria	Eccleston	pbaccile	khurns	khurns	20040	Dir Online Learning & Services	IN	FT	lz35	Staff
cdion	Celine	Dion	abocelli	trebleclef	hsaprano	15624	Music & Grounds Entertainment	CM	FT	C256p	Staff
aartiles	Amy	Artiles	wbaritone	yacapella	ttenor	28973	Database Specialist	OP	FT	O582s	Staff

Datasource
Editing: WCC-AllEmployees

Info

Authentication

Data

Import/Export

Display Settings

Data Blocks

Relationships

Data blocks for datasource - WCC-AllEmployees

Results: 1 - 1 of 1 Item(s)

	Data Block Name	Type	Connection	Required	Edit
<input type="radio"/>	WCCAllEmployees	Primary	CSV File Upload	Yes	Edit

360 Project Overview: One Questionnaire

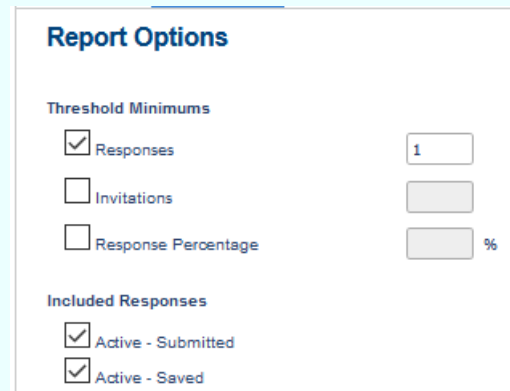
- ❖ All questions on one Questionnaire
- ❖ Three sections for each Rater Group who complete the survey
 - Direct Supervisor, Employee, and Executive Officer
- ❖ Streamlined form with user-friendly piping of fields such as names and job titles
 - Rating questions
 - Open feedback with comment fields
 - Multiple selection and open comment area for Professional Development
 - Supervisor Signature and Date with specific release to Employee Report
 - Summary Page to review and access the Submit button
 - Can access the form throughout FO window, even after feedback form is submitted
- ❖ Built-in instructions using Section Details to prompt, guide and assist the users

2021 – Workflow

- ❖ Direct Supervisor completes the survey for each Employee
- ❖ Direct Supervisor reviews the feedback with Employee during virtual meeting
 - View feedback - special Direct Supervisor Report or the FO form
- ❖ Direct Supervisor releases the Report to Employee with a triggered question on the FO
 - Overnight processing allows Employee to view Report
- ❖ Employee completes the FO
 - Acknowledgement first question Triggers after meeting with Direct Supervisor
 - Employee can view the Report and also comment on the review and sign off
 - Report includes both Submitted and Saved responses and has automatic update so processes overnight
- ❖ Executive Officer reviews each report, and accesses their portion of each form to sign-off
- ❖ Blue Dashboard is accessed from a module on Blackboard, our LMS
 - Displays the Task (FO) and the Reports (current and prior)

2021 – Annual Performance Appraisal Workflow

- ❖ Direct Supervisor completes the survey for each Employee
- ❖ Direct Supervisor reviews the feedback with Employee during virtual meeting
 - Uses the special “Direct Supervisor Report” or the “FO form”
 - Can access the FO form even if it has been submitted
- ❖ Direct Supervisor releases the Report to Employee with a triggered question on the FO
 - Overnight processing allows Employee to view Report



The screenshot shows a web form titled "Report Options". It is divided into two main sections: "Threshold Minimums" and "Included Responses".

Threshold Minimums

- ☒ Responses: 1
- ☐ Invitations:
- ☐ Response Percentage: %

Included Responses

- ☒ Active - Submitted
- ☒ Active - Saved

360 Project Overview: Streamlined Form

- Welcome Screen utilized as landing page with piped Employee name and job title



The screenshot shows a web-based performance appraisal form. At the top left is the Washtenaw Community College logo. The main heading is "2020-2021 Annual Performance Appraisal for Gloria Eccleston". Below this, it says "Appraisal for Gloria Eccleston, Dir Online Learning & Services." and "Step-by-Step Supervisor Instructions are available for you here." with a link. A instruction at the bottom says "Please click the **Next** button at the bottom to proceed to the Annual Performance Appraisal." The bottom navigation bar contains five buttons: "Summary", "Previous", "Next" (highlighted in yellow), "Save", and "Submit".

360 Project Overview: Streamlined Form

- Clean flow with specific directions at the bottom

Washtenaw Community College

2020-2021 Annual Performance Appraisal for [REDACTED]

PERFORMANCE INDICATORS for [REDACTED]

★ Performance indicators reflect baseline expectations, common to all positions. The indicators are intended to assist you through the process of identifying the Employee's strengths and areas needing attention. Review the indicators and select the appropriate box.

Note: In the last column, you may select from the drop-down menu the areas where Professional Development is recommended.

	Exceeds Expectations	Meets Expectations	Does Not Meet Expectations	Not Applicable	Professional Development Recommended
Job Knowledge	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Professionalism (loyalty, integrity, honesty, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Initiative and Resourcefulness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Judgment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Contribution to Department Goals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Communication Skills / Tactfulness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Dependability; Follow Through	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Attendance / Punctuality	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Professional Image	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Professional Development	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Impact on Meeting Needs of Students / Community / Customers (Internal or External)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Impact on Student Success & Retention	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Adherence to Policies and Procedures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Adherence to Budget	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Management Ability (staffing, guidance, morale, delegation, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>

Please select the Next button at the bottom of this page to continue to the Supervisor's review comment questions.

Summary Previous Next Save Submit

360 Project Overview: Streamlined Form

- ❖ 1. Open fields for comment feedback and expandable boxes
- ❖ 2. Professional Development Plan with selection options and open comment area

The screenshot displays the '2020-2021 Annual Performance Appraisal' form. A green '1' is placed over the 'Strengths and accomplishments of this employee contributing to a successful performance' section. A red box highlights a small icon in the top right corner of this section. A green '2' is placed over the 'Professional Development' section, which includes a list of training topics and a comment box for other training.

2020-2021 Annual Performance Appraisal for [redacted]

Independent Supervisor's Review Section

★ Strengths and accomplishments of this employee contributing to a successful performance

Performance / Department Goals completed this FY:

Performance / Department Goals for next FY:

Professional Development completed this FY:

Summary evaluation of performance

Please select the feedback entries in this page to submit the supervisor's review comments.

IND - Professional Development:

Instructions:

To assist in building a specified training and development plan, please check the boxes next to the topics in which professional development would benefit this employee's overall performance. Each training topic is typically 1 hour (Workplace Effectiveness topics may be longer), session titles may vary slightly when listed in the Kalpa catalog. The Supervisor training series is typically held in a group setting; scheduled training dates will be communicated separately.

★ Diversity & Inclusion training:

- ☐ Working Together: Diversity in the Workplace
- ☐ Learning from Microaggressions
- ☐ Confronting Bias and Thriving Across Differences
- ☐ Creating Accessible Documents
- ☐ The Multigenerational Workplace
- ☐ Other

Other Diversity & Inclusion training:

Supervisor, if you checked the "other" box from the list above, please indicate the title of the training in this comment section.

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360 Project Overview: Streamlined Form

- Electronic signature and date
- Clear instructions of specific action within question body
- Directions of how to proceed included in Section Details

SUPERVISOR'S SIGNATURE AND DATE:

★ **Requirements of the job are**
☒ Satisfactory (Satisfactorily met)
☐ Unsatisfactory (Not met)

?★ **Full Name of Supervisor**
Gloria, please type your full name which serves as your electronic signature. My electronic signature acts as a traditional handwritten signature.
g l e

?★ **Date of Performance Review on**
Gloria, please type the date that you are signing this Appraisal
g l e

★ **I have met to discuss this Annual Performance Appraisal with** and I am ready to release this Appraisal to Amy to review, comment, and sign-off on.
Note that the pdf version (the Report) will not be available for viewing until tomorrow, as overnight processing is required. We strongly encourage you to complete this form one day prior to meeting with Amy.
☒ No, we have not met yet. I will schedule this meeting with my Employee.
☐ Yes, we have met and I want to release this to my Employee (visible tomorrow)

Your immediate action now is to select the **NEXT** button at the bottom. There you will select the **SUMMARY** button. Once on the Summary page, you can select **SUBMIT** to process the completed form. Please note that both saved and submitted evaluations can be readily accessed again for your modifications during this 2020-21 evaluation period, and while meeting with Amy.

Interim responses saved.

Summary Previous Next Save Submit

360 Project Overview: Streamlined Form

- Final page of form requires and instructs Direct Supervisor to hit the Summary button to proceed
- Submitted and Saved surveys can both be accessed
- ONLY the Summary page displays the Submit option

Your immediate action now is to select the **NEXT** button at the bottom. There you will select the **SUMMARY** button. Once on the Summary page, you can select **SUBMIT** to process the completed form. Please note that both saved and submitted evaluations can be readily accessed again for your modifications during this 2020-21 evaluation period, and while meeting with Gloria.

Interim responses saved.

Summary

Previous

Next

Save

Submit

I have met to discuss this Annual Performance Appraisal with Amy Artiles, and I am ready to release this Appraisal to Amy to review, comment, and sign-off on. Note that the pdf version (the Report) will not be available for viewing until tomorrow, as overnight processing is required. We strongly encourage you to complete this form one day prior to meeting with Amy. ★

Yes, we have met and I want to release this to my Employee (visible tomorrow)

Interim responses saved.

2020-2021 Annual Performance Appraisal for Amy Artiles

Return to Prior Page

Previous

Next

Save

Submit

360 Project Overview: Trigger Mania

- Triggers based on the Staff group and relationship to the Employee (subject)

Trigger List

Move to position

Go

Results: 1 - 9 of 9 Item(s)

<input type="checkbox"/>	Index	Trigger Name	Condition	Action
<input type="checkbox"/>	1	Employee Section	Condition	Action
<input type="checkbox"/>	2	Employee Acknowledgment Condition No	Condition	Action
<input type="checkbox"/>	3	Common - Employee Comments	Condition	Action
<input type="checkbox"/>	4	Employee Acknowledgment Condition Yes	Condition	Action
<input type="checkbox"/>	5	CM - Direct Supervisor - Ratings and Comments	Condition	Action
<input type="checkbox"/>	6	OPT - Direct Supervisor - Ratings and Comments	Condition	Action
<input type="checkbox"/>	7	IND - Direct Supervisor - Ratings and Comments	Condition	Action
<input type="checkbox"/>	8	Common - Direct Supervisor - Signature and Date and Submit	Condition	Action
<input type="checkbox"/>	9	Executive Officer Section	Condition	Action

360 Project Overview: Intricate Conditions and Actions

- Display specific questions
 - Each of the three staff groups have custom questions which only appear on their form
 - Direct Supervisor only sees questions that they must respond to
 - Employee only sees Employee specific questions
 - Executive Officer sees specific prompts

2020-2021 Annual Performance Appraisal for Gloria Eccleston	
EMPLOYEE SIGNATURE AND DATE: After reviewing your Annual Performance Appraisal, please sign and date as your acknowledgement. Note: Signature of the Employee does not indicate agreement, only that the Employee has seen the evaluation and has had an opportunity to write comments, including a statement of disagreement, if desired.	
★	I have read this performance review and appraisal thoroughly. <input type="text"/>
★	I ____ submitting my own comments. <input type="text"/>
EXECUTIVE OFFICER'S SIGNATURE AND DATE: After reviewing each Annual Performance Appraisal, please sign and date as your acknowledgement.	
?★	Full Name of Executive Officer Kimberly, please type your full name which serves as your electronic signature. My electronic signature acts as a traditional handwritten signature. <input type="text" value="Kimberly Hurns"/>
?★	Date of Executive Officer Signature for Annual Performance Appraisal of Gloria Eccleston Kimberly, please type the date that you are signing this Appraisal <input type="text" value="6/27/21"/>
Kimberly, please fill in all fields and then click the Next button, which takes you to the Summary Page where you can Save or Submit your responses.	

360 Project Overview: Question Trigger

- “Yes” response to question on Direct Supervisor’s form will create the report and release the report to the Employee and Executive Officer

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I have met to discuss this Annual Performance Appraisal with [S\$FN] [S\$LN], and I am ready to release this Appraisal to [S\$FN] to review, comment, and sign-off on. Note that the pdf version (the Report) will not be available for viewing until tomorrow, as overnight processing is required. We strongly encourage you to complete this form one day prior to meeting with [S\$FN].

Single
Selection

I have met to discuss this Annual Performance Appraisal with Gloria Eccleston, and I am ready to release this Appraisal to Gloria to review, comment, and sign-off on. Note that the pdf version (the Report) will not be available for viewing until tomorrow, as overnight processing is required. We strongly encourage you to complete this form one day prior to meeting with Gloria.

- ☐ No, we have not met yet. I will schedule this meeting with my Employee.
- ☒ Yes, we have met and I want to release this to my Employee (visible tomorrow)

360 Project Overview: Question Trigger for Employee

- Piped Employee name
- “Yes” response by Employee, opens up the form, allowing the Employee access to their Employee questions



The screenshot shows a web-based performance appraisal form. At the top left is the Washtenaw Community College logo. The title of the form is "2020-2021 Annual Performance Appraisal for Gloria Eccleston". Below the title is a question marked with a red star: "I have met with my Supervisor to review and discuss my Annual Performance Appraisal". There are two radio button options: "Yes, I have met with my Supervisor" (which is selected) and "No, not yet". At the bottom of the form are five buttons: "Summary", "Previous", "Next", "Save", and "Submit".

360 Project Overview: Three Reports

❖ One Project with Three Reports

– Supervisor Only Report

- Direct Supervisor viewers only (Populate only Direct Supervisor group)
- Used during one-on-one review with Employee

– Annual Performance Appraisal Report

- All groups are viewers
- Question filter so it is NOT visible until the Direct Supervisor responds “Yes” to the question that I have met to discuss this with my Employee
- Must process overnight

– President Report

- Subject filter – only Employees with President as Direct Supervisor or Executive Office

360 Project Overview: Communication

❖ Blue Emails

- **Customized emails for each group –**
 - Director Supervisor
 - Employee
 - Executive Officer
- **Specific purpose of each with detailed instructions**
 - Links to the Blue Dashboard
 - Links to the step-by-step guided instruction

360 Project Overview: Communication

❖ Blackboard Module

- Leveraged Human Resources tab on Blackboard with simple hyperlink to the Blue Dashboard
- Linked to detailed step-by-step instruction sheets for each group



HUMAN RESOURCES
Manager Toolkit

Performance Management

Annual Performance Appraisals

Online Performance Appraisals Dashboard (all Groups)

- Instructions for Supervisors
- Instructions for Executive Officers
- Instructions for Employees

360 Project Overview: Communication

❖ Blue Dashboard

- Displays the Tasks (FO)
- Displays the Reports – Current and previous year

The screenshot shows the Explorance Blue Dashboard interface. At the top, a dark blue header bar contains the Explorance logo, a welcome message for Gloria Eccleston, and links for language selection (English) and sign out. A left sidebar shows navigation options: Home and Response Rate. The main content area is titled 'My Home' and is divided into two sections: 'Tasks' and 'Reports'. The 'Tasks' section shows two completed tasks related to annual performance appraisals for Amy Ariles and Gloria Eccleston. The 'Reports' section shows three reports, including the 2020-2021 Annual Performance Appraisal, the 2019/2020 Independent Group report, and the 2020-2021 Supervisor ONLY report. The interface includes search bars, filters, and sorting options for both sections. A 'blue' logo is visible in the bottom left corner of the dashboard area.

Lessons Learned

- ❖ Streamlining to one project beneficial
- ❖ Additional time to thoroughly test, adjust, and retest really paid off
- ❖ Links in emails to Blackboard content requires additional authentication – problematic for end-user
- ❖ Multi-purpose datasource causes confusion as many are also in our SOQ projects
- ❖ Project does not have auto-update – staffing changes requires manual work
- ❖ Executive Officer can sign-off without reviewing the feedback
- ❖ On-boarding new Blue Administrator while creating the Project and workflow was insightful, time consuming and very rewarding
- ❖ Teaming up with Andres and Explorance before we started creating the project was superior – exceptional teamwork!

Lessons Learned – Big Wins from HR Perspective!

- ❖ Using Blue eliminated the paper-shuffling, filing, and saved the trees
- ❖ All appraisals are electronic and filed in ONE place; easily accessible
 - ❖ Supervisor changes are easier to manage in the future
- ❖ Able to track completion and drill down on each employee and department
- ❖ Able to extract issues (un-satisfactory appraisals)
- ❖ Able to identify the Professional Development required and report out from these
 - ❖ Build out some global Professional Development training opportunities

Step-by-Step Project Summary

- ❖ Multi-rater License
- ❖ Subject Definition project
- ❖ Create multiple rater Groups
- ❖ Different type of groups set up
- ❖ Triggers
- ❖ Form Fill-Out Tasks emails per group
- ❖ Reports access (how to populate)

Multi-raters License

explorance. Welcome **Explorance Support**
Washtenaw Community College

BLUE **ADMIN**

Connection

License Blue Database Components API Key DLL Information

Blue License Registration

License File No file chosen

License Info

Installed Version	7.19.3.49584
License Owner	Washtenaw Community College
License Expiration	01/31/2050
Blue	Yes
Evaluation Module	Yes
Survey Module	Yes
Multi-raters	Yes
Blue Administrators	4 (4 used)
Report Managers	10000000 (3495 used)
Project Managers	0 (0 used)
Project Manager Assistants	0 (0 used)
Subjects	10000000 (3499 used)
Secondary Subject	Yes
SAP	No

A “Subjects” Definition

The screenshot displays the Explorance Admin interface. The top navigation bar includes the Explorance logo and a welcome message for Washtenaw Community College. The left sidebar contains a menu with items: BLUE, ADMIN, Connection, SSO Profiles, Organization, Datasources, Definitions (highlighted with a red box), Configuration, Activity Logs, and Record Mgmt. The main content area is titled 'Definition' and 'Editing: PerformanceAppraisal'. It features a tabbed interface with 'Info' selected. The 'Info' tab contains fields for 'Definition Title' (PerformanceAppraisal), 'Description', 'Type' (Subjects, highlighted with a red box), 'Subject Source' (WCC-AllEmployees), 'Secondary Source', and 'Pairing Source' (N/A (Primary/Secondary)).

explorance.

Welcome Explorance Support
Washtenaw Community College

BLUE ADMIN

Connection

SSO Profiles

Organization

Datasources

Definitions

Configuration

Activity Logs

Record Mgmt

Definition

Editing: PerformanceAppraisal

Info Organizational Links Groups Shared Groups Filters Language

Definition Title PerformanceAppraisal

Description

Type ☒ Subjects
☐ Primary/Secondary Subject Pairings
☐ Primary/Secondary Subject Pairings - Multiple Secondary (Multiple Secondary Pairings)
☐ Data Integrity Gateway (DIG)

Subject Source WCC-AllEmployees Employees en (Pri

Secondary Source en (Second

Pairing Source N/A (Primary/Secondary)

The different rater groups linked to their report access

The screenshot displays the Explorance system interface. The top navigation bar includes tabs: Info, Questionnaire, Definition (highlighted), Subjects, Members, Triggers, Access, Tasks, Language, and Publish. Below this, a sub-navigation bar shows: General, Organizational Links, Group (highlighted), Shared Group, Subject Filter, and Group Filter. The main content area is titled 'Groups' and shows 'Results: 1 - 5 of 5 Item(s)'. A table lists the groups with columns for selection, Group Name, Privileges, Link Type, and Edit. The 'Executive Officers' row is highlighted, and a red box encloses the first three rows of the table.

	Group Name	Privileges	Link Type	Edit
<input type="radio"/>	Direct Supervisors	FO, RV	Link	Edit
<input type="radio"/>	Executive Officers	FO, RV	Link	Edit
<input type="radio"/>	Supervisors II	RV	Link	Edit
<input type="radio"/>	HR_Staff	RV	Global	Edit
<input type="radio"/>	Employees	FO, RV	Link	Edit

Buttons at the bottom: Delete, Delete All, Add Group, Export Groups.

Multi-raters link – Links to – Relationship

OriginalID	First Name	Last Name	Direct Supervisor	Supervisor II	Executive Officer	Org #	JOB DESC	Staff Group	Full-time Part-time	Job Level	Job Role
geccleston	Gloria	Eccleston	pbaccile	khurns	khurns	20040	Dir Online Learning & Services	IN	FT	Iz35	Staff
cdion	Celine	Dion	abocelli	trebleclef	hsaprano	15624	Music & Grounds Entertainment	CM	FT	C256p	Staff
aartiles	Amy	Artiles	wbaritone	yacapella	ttenor	28973	Database Specialist	OP	FT	O582s	Staff

StaffID	SupervisorID
geccleston	pbaccile
cdion	abocelli
aartiles	wbaritone

Questions for each Group Member

InfoQuestionnaireDefinitionSubjectsMembersTriggersAccessTasksLanguagePublish

Internal TriggersExternal Triggers

Trigger List

Move to positionGo

Results: 1 - 9 of 9 Item(s)

<input type="checkbox"/>	Index	Trigger Name	Condition	Action
<input type="checkbox"/>	1	Employee Section	Condition	Action
<input type="checkbox"/>	2	Employee Acknowledgment Condition No	Condition	Action
<input type="checkbox"/>	3	Common - Employee Comments	Condition	Action
<input type="checkbox"/>	4	Employee Acknowledgment Condition Yes	Condition	Action
<input type="checkbox"/>	5	CM - Direct Supervisor - Ratings and Comments	Condition	Action
<input type="checkbox"/>	6	OPT - Direct Supervisor - Ratings and Comments	Condition	Action
<input type="checkbox"/>	7	IND - Direct Supervisor - Ratings and Comments	Condition	Action

DeleteAdd Trigger

Form Fill-Out Tasks emails per Group

Invitation Email

Group **Employees** ▼

Sender **All**

Human Resources **Employees**

Sender Email
askhr@wccnet.edu

Reply to
askhr@wccnet.edu

Cc

Bcc

Subject
2020-21 Annual Performance Appraisals Coming Soon (for Employees)

Message

<p>Dear [S\$FN],

Our Annual Performance Appraisals (performance reviews) will be conducted using the same online platform as last year, with a slightly modified process. Your Supervisor will schedule an appointment with you to review your appraisal and discuss this year's performance. There is nothing for you to do at this time, although you can review last year's Annual Performance Appraisal if you wish. You can access it by going to the Human Resources tab in Blackboard, and under the Manager Toolkit sub-tab, you will find the Performance Management module with the Dashboard link, named Online Performance Appraisals Dashboard. You will log in with your netID and Password, and then select the User Group "WCC_AllEmployees" from the dropdown menu. Near the bottom of this page you'll see your 2019-20 Performance Review in the Reports area.

Invitation Email

Group **Direct Supervisors** ▼

Sender Name
Human Resources

Sender Email
askhr@wccnet.edu

Reply to
askhr@wccnet.edu

Cc

Bcc

Subject
2020-21 Annual Performance Appraisals (for Direct Supervisors)

Message

Dear [R\$FN],

Our Annual Performance Appraisals (performance reviews) will be conducted using the same online platform as last year, with a slightly modified and streamlined process. The main enhancement is your ability to release the completed Appraisal to your Employee by simply responding "Yes" to the final question on the form after you have had the one-on-one meeting and discussion. It will process overnight. All Annual Performance Appraisals should be completed by June 30, 2021.

Please complete the Annual Performance Appraisal form for each of your employees using \$(this Annual Performance Appraisal form), or go to the Human Resources tab in Blackboard, and under the Manager Toolkit sub-tab, you will find the Performance Management module with the Dashboard link, named Online Performance Appraisals Dashboard. You will log in with your netID and Password, and then select the User Group "WCC_AllSupervisors" from the dropdown menu. Near the bottom of this page you'll see your 2019-20 Performance Review in the Reports area.

Report Access – How to Populate

Report Title: Annual Performance Appraisal (Published) 2020-2021

Individual Report Title: [SSLN], [SSFN] Annual Performance Appraisal (Published) 2020-2021

Report Description:

Tags: Andrea x Email Off x Gloria x HR Group x auto-updates x Add...

Category: Appraisals

Subcategory: 2020/2021

Header:

Footer: Annual Performance Appraisal 2020-2021

Remarks:

Prepared by: Amy Artiles en

Report Type:

- ☐ Roll Over
- ☒ Individual
- ☐ Group by: WCC-AllEmployees
- ☒ Distributed
- ☐ Breakdown by Secondary Subject
- ☐ Export
- ☒ Automatic Update
- ☒ Update static viewers automatically from project group definition
- ☐ Merge Subjects

My Reports

Editing: Annual Performance Appraisal (Published) 2020-2021

Info Content Filters Subjects Viewers Access

Static Viewers Dynamic Viewers Static Viewers Export / Import

Static Viewers

Name Contains Search

Available Reports

Results: 1 - 10 of 336 Item(s)

Aaron Lyles
Aimee Smith
Alan Lecz
Alicia Portelli
Allie Gardner
Alyssa Mallett
Amanda Peters
Amy Artiles
Amy Carpenter
Amy Kenyon

Select Group: Direct Supervisors

- Direct Supervisors
- Executive Officers
- Supervisors II
- HR_Staff
- Employees

Populate Populate All Remove All

Moving Forward

❖ Datasource confusion:

- Add the Employee users to the current datasource with Staff (SOQ faculty and supervisors)
- Create relationship files with the additional information
- Mothball the WCC_AllEmployees datasource
- Transition 2020 and 2021 Projects and Reports to the Staff datasource

❖ Include project auto-update

❖ Resolve work around so Executive Officer acknowledges the feedback before sign-off

❖ Review and make instruction sheets and emails even more detailed

❖ Include link to the instructions on the Direct Supervisor's landing page (Welcome page)

❖ Continue teaming up with Andres and Explorance before we starting building V 3.0

Thank You

Email us your questions –

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geccleston@wccnet.edu

anartiles@wccnet.edu



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Community
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