



Completing your Manager Evaluation



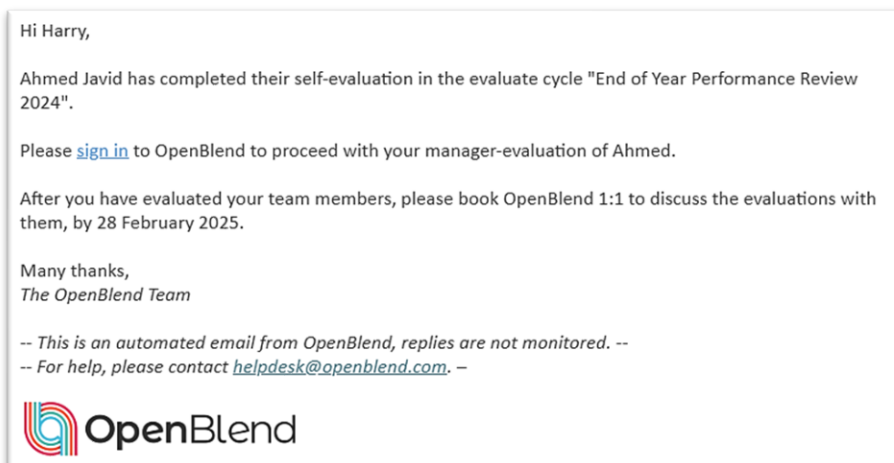
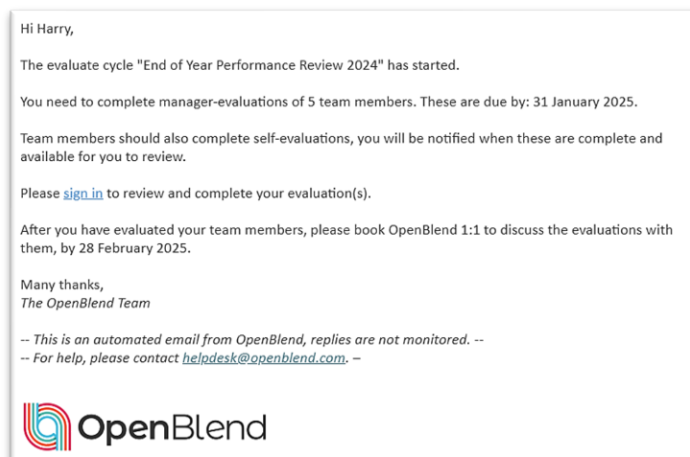
Evaluate is a simple yet highly supportive and effective way of evaluating performance at certain periods throughout the year; for both a manager and a direct report. In this article, we will walk you through how to complete your Manager Evaluation.

Accessing Evaluate

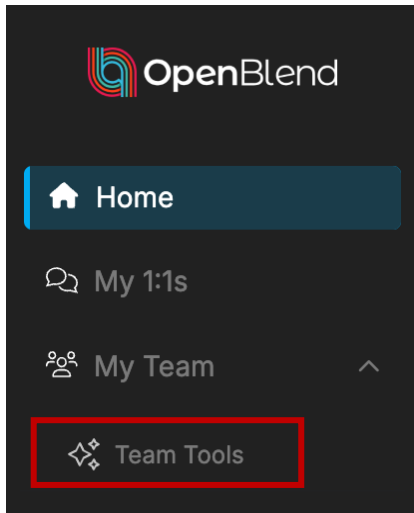
Accessing Evaluate from OpenBlend Notifications

When an evaluation cycle is started, you will receive the following email from OpenBlend, alerting you that you have Evaluation(s) to complete for your team. You will also be notified when your direct reports have completed their self-evaluation (if applicable).

You can use the "**Sign in**" link to access the evaluation(s) you need to complete. This link will take you straight to your Evaluate Manager Evaluation page.



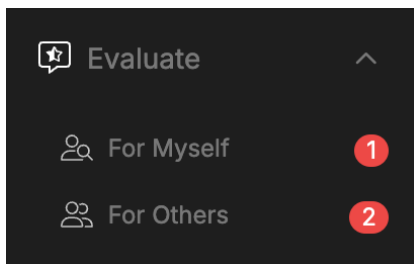
Accessing Evaluate from your OpenBlend "My Team" Area



Once you have logged in to OpenBlend, simply click on the **"My Team"** button on the home screen. Then click on **"Team Tools"** in the left-hand side navigation bar.

From the Team Tools menu, select the 'Evaluate' tab from the top menu to display all open Evaluate Cycles.

We have also expanded Evaluate outside of the 'Me' section, into the main navigation to support Managers who will be completing Evaluations for direct reports.



When clicking on 'For Myself' you will be taken to self-evaluations you need to complete (for you). 'For others' will guide you to completing evaluations for direct reports.

NOTE: If you cannot see the Evaluate menu item on the Team Insights page, this will be due to the cycle not being made applicable to you. If you believe you should have access to this, please contact your HR Team.

Once you are in Evaluate; you will have three options depending on the status of the cycle:

- **Start:** For any cycles that you have not yet started
- **Continue:** Where you may have partly completed a review for a direct report, or you have more than one direct report and have outstanding reviews
- **View:** For any completed cycles

Evaluation name	Start date	Evaluations due	End date (discussions due)	Status of my Manager Evaluations
Annual appraisal	15 February 2024	28 June 2024	31 July 2024	In Progress Continue
Quarterly Performance and Potential	15 February 2024	30 April 2024	17 May 2024	Not Started Start
Annual appraisal - no approval - April 2024	16 February 2024	26 April 2024	10 May 2024	In Progress Continue
Annual appraisal - no approval	16 February 2024	31 October 2024	16 February 2024	Completed View

Show 10 1 - 4 of 4

Completing your Manager Evaluation(s)

Click on the **direct report's name** to access the questions, as seen in the screenshot below to start your manager review.

📅 Evaluation Started: 15 Feb 2024 | 📅 Manager evaluations due: 28 Jun 2024 | 📅 Cycle End: 31 Jul 2024

My Evaluations

These are the reviews that you are tasked to complete for your talents. Your deadline is 28/06/2024. You have **0 days** remaining.

🔍 Search by name Show all ▾

- Prerna Kimble Not Started →
- Ahmed Javid Not Started →
- John Simon Not Started →
- Lilly Kline Not Started →
- Emma Mason Completed →

My Team's Self-Evaluations

These are self-evaluation reviews that your talents need to fill in for themselves. They are due 30/04/2024. They have **0 days** left to fill in.

🔍 Search by name Show all ▾

- Prerna Kimble Not Started →
- Ahmed Javid Not Started →
- John Simon Not Started →
- Lilly Kline Not Started →
- Emma Mason Completed →

NOTE: We recommend that you allow your direct report to complete their self-evaluation before you complete your review so you can see their responses. If your direct report has completed their self-evaluation, you will see their comments on the right-hand side of the evaluation.

My Team's Self-Evaluations

These are self-evaluation reviews that your talents need to fill in for themselves. They are due 30/04/2024. They have **0 days** left to fill in.

🔍 Search by name Show all ▾

- Ahmed Javid Not Started →
- John Simon Not Started →
- Lilly Kline Not Started →
- Emma Mason Completed →
- Prerna Kimble Completed →

[Show full list](#)

Prerna Kimble

Evaluate Snapshot

1. Rate and describe the overall performance this year, noting key achievements required

Chosen selection ⓘ

Select an option ▾

Comments

PRERNA'S SELF EVALUATION

Satisfactory ⓘ

This year, I am proud of several key achievements that have contributed to my overall strong performance. I successful...

[See more](#)

Hide reflection and development tips

Reflection tips

- Please refer to the employee snapshot for a reminder of progress
- It's important to remain objective when evaluating - subjectivity should be avoided and self challenged
- Consider how you will discuss your feedback when face to face

Evaluate questions are structured with either comments only or comments and a drop-down selection. You are also provided with some "Reflection tips" to help you with your evaluation.

During this process, the progress of your review is auto-saved so you can come back to your review and complete it later if required.

Repeat this process for each of your direct reports until you have completed all your manager evaluations.

Once you have completed your manager evaluation, click the "**Submit**" button and this will then finalise your review.

Booking an Evaluate 1:1 with your direct report

Once you and your direct report have submitted your written reviews, it will be moved to the 'Ready to Discuss' status (or 'Submitted' if HR Review is being used. Once the HR Review process is complete the status will show as 'Approved for Discussion').

When you initially submit the review you will be prompted to book a 1:1 with your direct report.

NEW End of Year Performance Review 2024 ×

Evaluation submitted for Alice Burnett

This evaluation is now available for you to discuss with Alice Burnett in a 1:1. Would you like to book a 1:1 to have this discussion? This evaluation is due to be discussed by 28 Feb 2025

[Continue without booking](#) [Book 1:1](#)

Also add into Alice Burnett's Agenda Items


You can choose to book a 1:1 with your direct report here by clicking 'Book 1:1'. To ensure you don't impact any recurring 1:1s, we suggest that you book a 'One Off' 1:1.

Book a 1:1
✕

Step 1 of 2

Book in calendar

Add the below email as an attendee to a meeting in your calendar to register it in OpenBlend.

 uat-rc-calendar@openblend.com

🗨️ 1:1 with No User Selected [Select User](#)

How often would you like to have this 1:1?

Fortnightly


Monthly Recommended

Custom Frequency

One Off

If you choose not to book a 1:1 at this stage, you can begin a 1:1 when you are ready by navigating to the Evaluate menu through 'Team Tools'. Click on the direct report whom you wish to have the 1:1 with and you will have two options from the pop-up: To 'Discuss in a 1:1' or to 'View on my own'. If you are ready to discuss, click on that option, and a 1:1 will be started immediately.

✕



Are you about to discuss this evaluation with Ahmed?

To complete the evaluation process, you need to discuss with Ahmed in a 1:1 and then click "Complete evaluation".

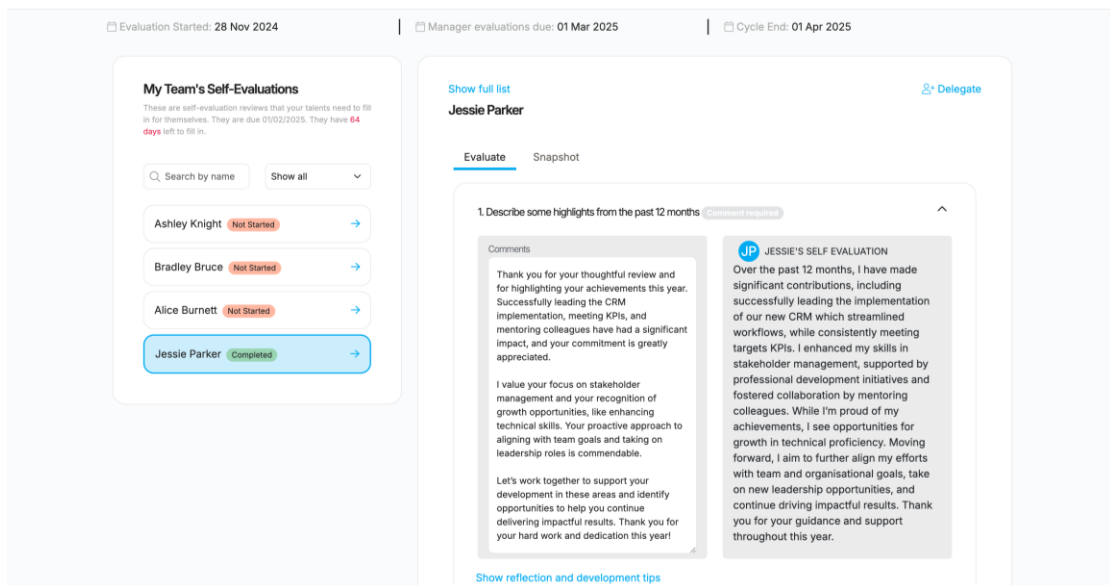
🗨️
Discuss in a 1:1 with Ahmed

👁️
View on my own

Discussing an Evaluate 1:1 with your direct report

If you have not already prepared an agenda you will be asked to select your Focus for the 1:1. You should select "Evaluate 1:1". You do not need to add anything to the agenda from here as the Completed Cycle (to be discussed), will automatically be added.

This will be your direct reports' first opportunity to review your evaluation comments, alongside their own – so make sure you have prepared for the 1:1



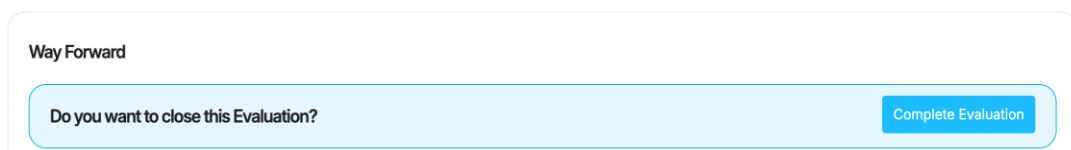
The screenshot displays the evaluation interface. At the top, it shows 'Evaluation Started: 28 Nov 2024', 'Manager evaluations due: 01 Mar 2025', and 'Cycle End: 01 Apr 2025'. The main section is titled 'My Team's Self-Evaluations' and lists team members: Ashley Knight (Not Started), Bradley Bruce (Not Started), Alice Burnett (Not Started), and Jessie Parker (Completed). The 'Evaluate' tab for Jessie Parker is active, showing a 'Comments' section with a manager's feedback and a 'JESSIE'S SELF EVALUATION' section with her own comments. The manager's comment reads: 'Thank you for your thoughtful review and for highlighting your achievements this year. Successfully leading the CRM implementation, meeting KPIs, and mentoring colleagues have had a significant impact, and your commitment is greatly appreciated. I value your focus on stakeholder management and your recognition of growth opportunities, like enhancing technical skills. Your proactive approach to aligning with team goals and taking on leadership roles is commendable. Let's work together to support your development in these areas and identify opportunities to help you continue delivering impactful results. Thank you for your hard work and dedication this year!'. Jessie's self-evaluation comment reads: 'Over the past 12 months, I have made significant contributions, including successfully leading the implementation of our new CRM which streamlined workflows, while consistently meeting targets KPIs. I enhanced my skills in stakeholder management, supported by professional development initiatives and fostered collaboration by mentoring colleagues. While I'm proud of my achievements, I see opportunities for growth in technical proficiency. Moving forward, I aim to further align my efforts with team and organisational goals, take on new leadership opportunities, and continue driving impactful results. Thank you for your guidance and support throughout this year.'

Making notes during your 1:1

There are two areas you can make notes in during your Evaluate 1:1:

- **Notes:** The notes section applies to all 1:1 scenarios and will be visible to you and your direct report following your 1:1 in 'Activity' and in 'My 1:1s'.
- **Additional comments:** Comments in this section will be saved within **this Evaluation only**. *You must remember to 'Save' any comments added.*

When you are ready to complete the Evaluate 1:1, scroll down to the 'Way Forward' section and click 'Complete Evaluation'. If you do not do this, the review will stay open, even when the 1:1 is ended.



The 'Way Forward' section contains a confirmation dialog box with the text 'Do you want to close this Evaluation?' and a blue button labeled 'Complete Evaluation'.