Completing your Self 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 self-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 a self-evaluation to complete.

You can use the "**Sign in to OpenBlend**" link to access the evaluation you need to complete. This link will take you straight to your Evaluate self-evaluation page.

Hi Jessie,

The evaluate cycle "End of Year 2024 Performance Review" has started - please complete your self-evaluation.

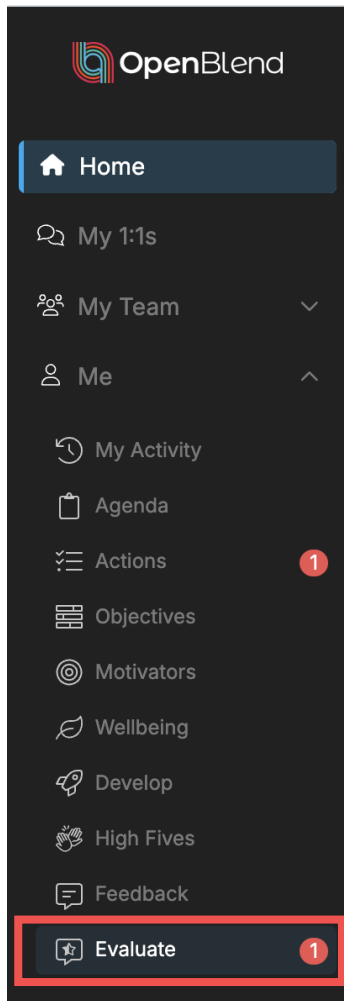This needs to be completed by 10 January 2025.

Sign in to OpenBlend to proceed.

Many thanks,

The OpenBlend Team

-- This is an automated email from OpenBlend, replies are not monitored. --
-- For help, please contact helpdesk@openblend.com. --

Accessing Evaluate from your home screen

Once you have logged in to OpenBlend, simply click on the "**Me**" tab on the left-hand side navigation panel to expand the menu. Then click on "**Evaluate**'.

We have also expanded Evaluate outside of the 'Me' section, into the main navigation. You can also access self-evaluations from here by clicking on the 'For Myself' tab.

When you have clicked into the Evaluate module you will be presented with a complete list of any Evaluate Cycles that you have been added to.

There will be a series of options depending on the status:

• Self Evaluation not started > **Start**
• Self Evaluation in progress > **Edit**
• Self Evaluation complete > **View Only**

NOTE: If you cannot see the Evaluate menu items on the left-hand navigation bar, 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.
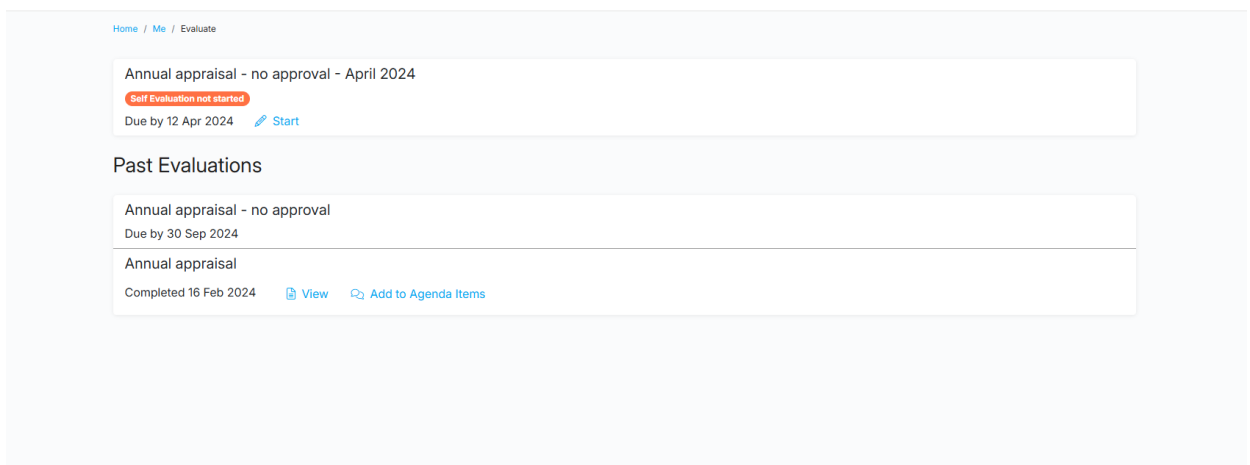
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NEW End of Year Performance Review 2024

Due by: 10 January 2025

Self Evaluation In Progress

1. Describe some highlights from the past 12 months Comment required

Comments

Adjusting to the responsibilities of my new role, alongside other challenges, took time and impacted my ability to fully meet all my goals. However I have learned a great deal from the experience and have made considerable progress in adapting to the role, which I am finding very enjoyable.

Hide reflection and development tips
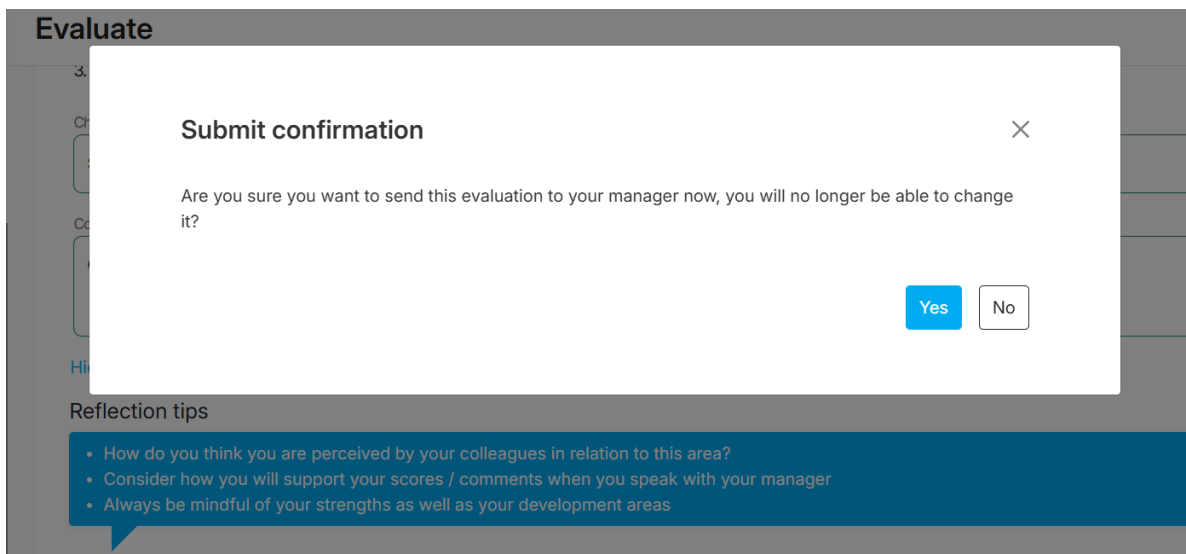
Reflection tips

- How do you think you are perceived by your colleagues in relation to this area?
- Consider how you will support your scores / comments when you speak with your manager
- Always be mindful of your strengths as well as your development areas

Simply complete each question in the review form.

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 self-evaluation.

During this process, Evaluate will auto-save so you'll be able to navigate away and complete later should that be required.

Once you have completed your self-evaluation, at the bottom of the page click the "**Send to manager**" button. This will then finalise your review and notify your manager that you have completed your self-evaluation.

Evaluate

3.

Submit confirmation ✕

Are you sure you want to send this evaluation to your manager now, you will no longer be able to change it?

Yes   No

Reflection tips

- How do you think you are perceived by your colleagues in relation to this area?
- Consider how you will support your scores / comments when you speak with your manager
- Always be mindful of your strengths as well as your development areas

What happens next?

Once you submit your review your manager will then be able to review this before adding their manager review comments.

Your manager will then complete their manager evaluation comments and book a 1:1 session to discuss the review with you.

You will not be able to see your manager's comments in your profile until they have had a session with you and clicked the "Mark Discussed" button. Once this has happened, you will be able to review your manager's comments within your profile.

NOTE: Your manager must be the one to start the session in OpenBlend and you will only be able to see your manager's comments once your manager has clicked 'Mark Evaluate as Complete' in the 1:1 session. If this does not happen, you will only be able to see your comments.