The Self Review Process on EDGE

Before we get into the EDGE specifics, it’s important to highlight the reasons we ask staff to complete a self review. If you think about effective performance dialogue, it centers around an ongoing, two-way discussion between a supervisor and staff member about performance, priorities and challenges. By including self-appraisals, we hope to promote this two-way dialogue, avoiding top down evaluations that tend to disengage staff.

You may be asking, how much detail should I include? This often depends upon your supervisor. It’s helpful to ask what their expectations are for your self review. Remember, this is just a tool, many conversations should occur outside of EDGE or the annual process to continue that dialogue regarding expectations and performance.

Self Review Questions
This section contains questions to prompt your reflection about this past year’s performance. It may also include questions regarding department-specific initiatives or themes. For instance, if your department interacts significantly with students or alumni, it’s likely there will be questions regarding those exchanges.

The steps in the review are shown at the bottom and a check mark will indicate the active step, in the graphic below the Self Review is indicated. You begin the review by clicking the Get Started button.

A progress indicator will be displayed on each section of the review so you are aware of your progress. You also can use the Options drop down to attach documents to the review as needed. An example of an attachment may be a word document you have describing your goals for this year. In the future, those goals should be in EDGE, but if they are not currently, you can attach them.
Questions may be text only or they may have a rating system associated with it. Below is an example of a rating box. Use the down arrow to see all ratings and select the one you feel best represents the answer to the question. Click on the question mark to see the entire rating scale, with descriptions.

Required questions will have a red * mark either after the question or next to the rating. If you try to submit a self review, without completing all required questions, you will receive instruction to complete all required questions.

At the end of each section, you have the option to select the following options:

**Back** - directs you to the previous section
**Save and Exit** - Saves your progress, exits the review for completion at another time
**Save and Continue** - Saves your progress, continues you to the next section
**Submit** - This will submit your review to your supervisor. Please make sure all necessary questions are completed before submitting. The system will notify you that you will no longer be able to make changes. This confirms you want to submit your self review to your supervisor.
Goals

There are two sections related to goals, Goal Assessment and Goal Planning. Goal Assessment is used to select goals in the system and provide feedback on how you felt you achieved those goals.

This is the Goal Assessment section. Click the Select Goals button to add a goal in EDGE to your section.

Your active goals will appear, and you click the checkbox on the left to select, then the Add button to Add it to the section.

Even if your progress in the system is 0%, you can update your evaluation of the goal and associated comments. Unless your supervisor instructs you to do so, you do not
need to update the progress % in the system. The achievement will be evaluated according to the following scale:

<table>
<thead>
<tr>
<th>Did Not Achieve Results</th>
<th>Results did not meet expectations regarding this goal. Priorities may have changed.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partially Achieved Expected Results</td>
<td>Results met some, but not all, expectations regarding this goal.</td>
</tr>
<tr>
<td>Fully Achieved Expected Results</td>
<td>Results met all expectations regarding this goal.</td>
</tr>
<tr>
<td>Achieved More Than Expected Results</td>
<td>Results exceeded most performance expectations regarding this goal.</td>
</tr>
<tr>
<td>Exceptional Achievement</td>
<td>Results exceeded all performance expectations regarding this goal.</td>
</tr>
</tbody>
</table>

In the Goal Planning section, you use the Add Goals/Expectations button to add a goal for the upcoming year or portion of the year.

![Student User]

Goal Planning and Expectations For Upcoming Performance Cycle

Provide at least one goal for the upcoming year. Also list any specific job expectations or areas of improvement for this employee to focus on in the upcoming year.

Use the Add Goals/Expectation button above and then Save at bottom when you've added all necessary Goals.

You will then see this screen below. The only required fields are Title and Due Date. Even though the Start Date and Due Date have dates, you can select different dates using the calendar icon to update as necessary. Tasks are not required, but may be a helpful tool to track progress on goals.
Again, when you choose to submit your review, you will see the dialogue box below, if you still want to make changes, select Cancel. If you are ready to submit, choose Submit.

If you have any questions, please contact lisa.adams-verge@bucknell.edu