



BURNABY LEADERSHIP

# PERFORMANCE PLANNING & EVALUATION

## PART B EVALUATOR GUIDE

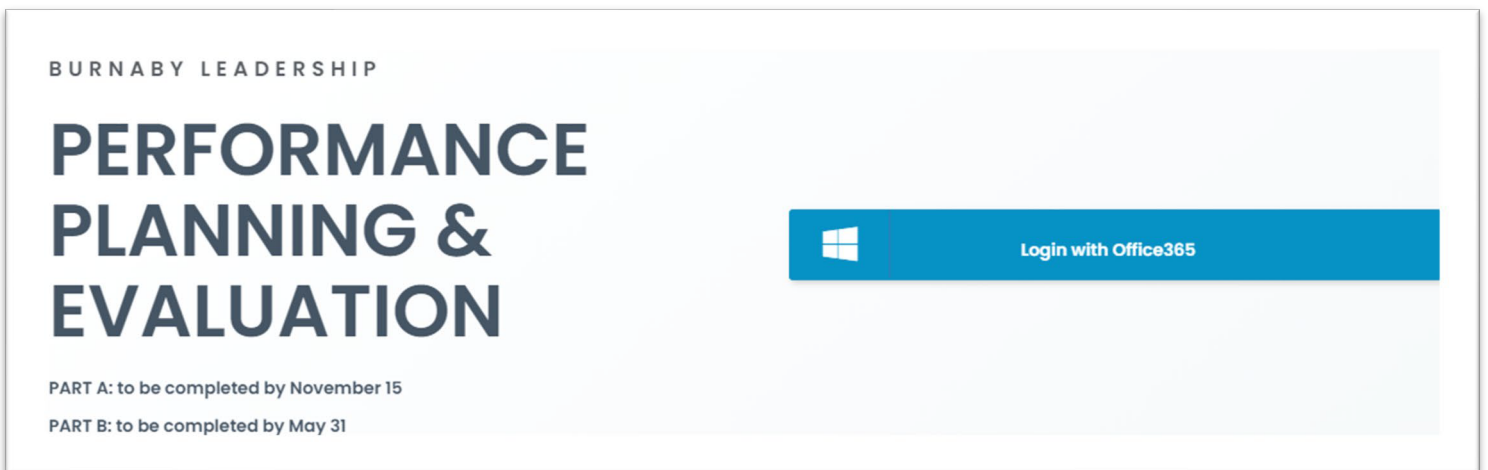
### Logging In

A. Type in your address bar <https://performance.burnabyschools.ca>

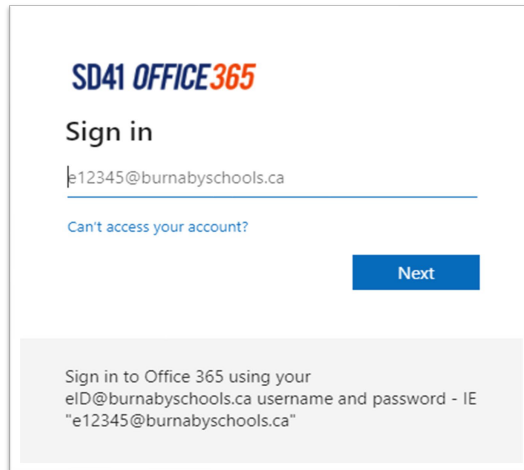


### B. Main Screen Login

Click on the blue 'Login with Office365' button



You will be prompted to enter your Office 365 username



SD41 OFFICE365

Sign in

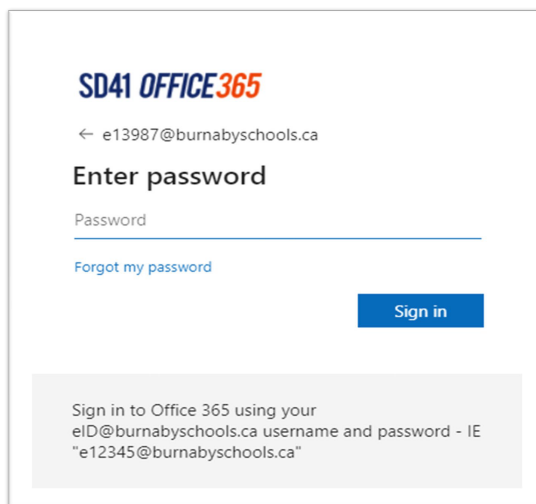
e12345@burnabyschools.ca

[Can't access your account?](#)

Next

Sign in to Office 365 using your eID@burnabyschools.ca username and password - IE "e12345@burnabyschools.ca"

Then enter your Office 365 Password



SD41 OFFICE365

← e13987@burnabyschools.ca

Enter password

Password

[Forgot my password](#)

Sign in

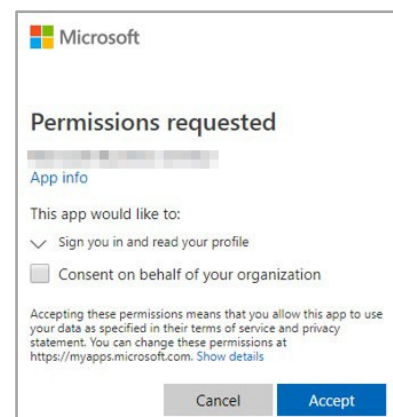
Sign in to Office 365 using your eID@burnabyschools.ca username and password - IE "e12345@burnabyschools.ca"

**Note:** You will be prompted with a **one-time** connection agreement to allow Office365 to connect to the performance planning site. Please click accept.

**Note:** After logging in once using Office 365, you may automatically sign in if you

have logged in elsewhere (like Outlook or Teams) in Office 365 (This is called Single Sign-On)

### C. Successful Login



Microsoft

Permissions requested

App info

This app would like to:

- Sign you in and read your profile
- Consent on behalf of your organization

Accepting these permissions means that you allow this app to use your data as specified in their terms of service and privacy statement. You can change these permissions at <https://myapps.microsoft.com>. [Show details](#)

Cancel Accept

BURNABY LEADERSHIP

# PERFORMANCE PLANNING & EVALUATION

Howdy, Lucky Saini | [Logout](#)

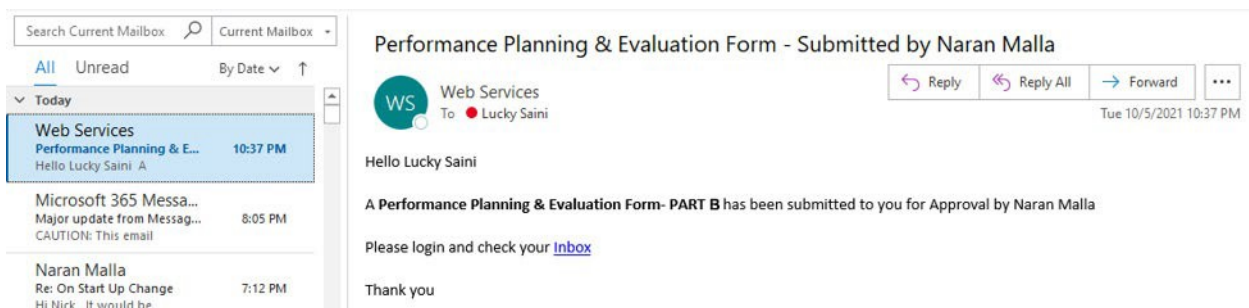
PART A: to be completed by November 15

PART B: to be completed by May 31

## Step 1: Receiving and Evaluating Employee Submissions

### A. Being Notified of a Part B Submission

After an employee submits their Part B Form, you will receive an email. It will prompt you to login and check your Workflow Inbox.



The screenshot shows an email interface. On the left is an inbox list with the following entries:

- Web Services**  
Performance Planning & E... 10:37 PM  
Hello Lucky Saini A
- Microsoft 365 Messa...  
Major update from Messag... 8:05 PM  
CAUTION: This email
- Naran Malla  
Re: On Start Up Change 7:12 PM  
Hi Nick, It would be

The main content area shows an email from Web Services (WS) to Lucky Saini. The subject is "Performance Planning & Evaluation Form - Submitted by Naran Malla". The email body contains:

Hello Lucky Saini

A Performance Planning & Evaluation Form- PART B has been submitted to you for Approval by Naran Malla

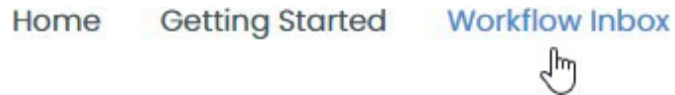
Please login and check your [inbox](#)

Thank you

B. Click on the 'inbox' link. If you have already logged into the Performance site already it will directly go to your Workflow Inbox

B. If you haven't logged in, refer to **Logging in** above.

After logging into the site go to the Workflow Inbox on the top right



The Workflow Inbox will let you know the pending request you have and indicate the step of the workflow.

Click on the link to begin.

Workflow Inbox

ID	Form	Submitter	Step	Submitted
63	Performance Planning & Evaluation – BPVPA	Naran Malla	Evaluator Approval	2 mins ago

Similar to Part A, this is where you review the Part B form of the employee. Note: Part A content will be above (in read-only format) and you will need to scroll down to see Part B

Once reviewed on the top right there will be a Workflow box that will allow you to either **'Approve'** or **'Reject'** it.

Selecting **'Reject'** will return the form to the employee and allow them to make the necessary updates, before submitting again.

Use the **note box** to provide details to the Employee.

Note \*

Everything looks good!

✓ APPROVE ✗ REJECT

**Workflow**

Entry ID: 63  
Submitted: October 5, 2021 at 10:36 pm  
Submitted by: Naran Malla  
Status: Pending

**Evaluator Approval (Pending Approval)**  
User: Lucky Saini (Pending)

Note \*

✓ APPROVE ✗ REJECT

## Step 2: After Approval - Evaluator Notes – Preparing for Meeting

After you have initially accepted Part B from the employee, the form will now allow you to enter in your Administrator/Manager notes. You will receive an email letting you know the next step.

### Performance Planning & Evaluation - BPVPA: Part B: Evaluator Meets and makes notes



Web Services  
To: Lucky Saini



Tue 10/5/2021 10:43 PM

Hello Lucky Saini

You have accepted Performance Planning Form- PART B from Naran Malla. You will now have the option to add notes to PART B of the form for your meeting.

Please click here to login and check your [Inbox](#)

Thank you.

Your workflow inbox will also reflect the next step.

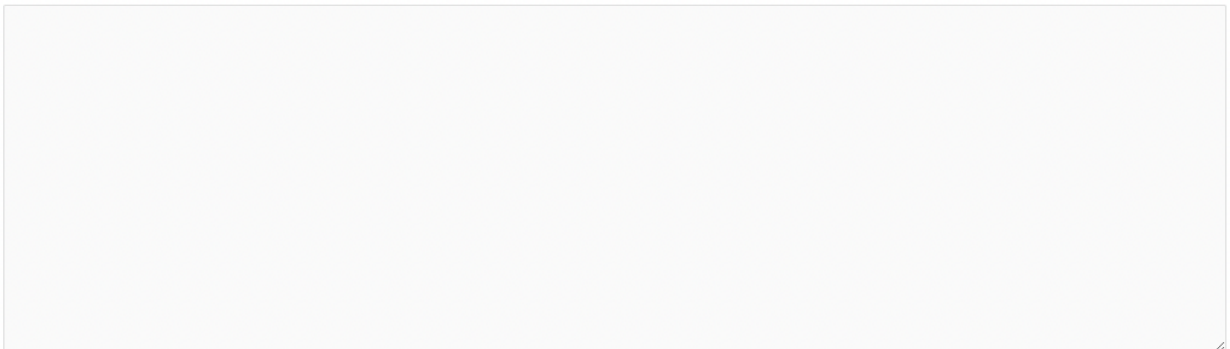
### Workflow Inbox

ID	Form	Submitter	Step	Submitted
63	Performance Planning & Evaluation – BPVPA	Naran Malla	Part B: Evaluator Meets and makes notes	7 mins ago

Note: *Evaluators have the choice to take notes in advance of the meeting, while they are having the meeting, or both.*

**If the employee has not addressed the question below in their professional objectives or professional growth plan, response will be reflected here**

If not a part of your performance objectives and/or professional growth, what commitment did you make to Equity, Diversity, Inclusion, and Reconciliation this year?



## **Performance Competencies Ratings**

Evaluators also have to provide ratings for each of the Employee's Performance Competencies.

Under the Rating dropdown next to the competency, select either:

- 'Good Performance'
- 'Improvement Needed'
- 'Unsatisfactory'

Notes can also be added below each of the Competencies and Ratings.

**PERFORMANCE COMPETENCIES FOR BPVPA (Administrator/Manager to provide rating)**

**1. Quality & Capacity of Work** – Completes work efficiently and in an accurate and acceptable format within an established timeframe, works to complete objectives and sees a task through to the end while taking into consideration current responsibilities

1. Quality & Capacity of Work Rating  
Good Performance ▾

Administrator/Manager Notes:

**Administrator/ Manager/ to provide Overall Rating of Employee's Annual Performance'**

The last part of the form will ask you to provide an overall rating as well as provide overall comments and area of focus

**OVERALL RATING OF EMPLOYEE'S ANNUAL PERFORMANCE**

Administrator/Manager:

Overall Comments:

Area of Focus:

**Workflow**

Entry ID: 63  
Submitted: October 5, 2021 at 10:36 pm  
Submitted by: Naran Malla  
Status: Pending

**Part A: Evaluator Meets and makes notes  
(Pending Input)**

User: Lucky Saini (Pending)

Note

In progress  Complete

If notes or ratings are added to part B of the form in advance of the meeting, leave the radio button selected as **'In progress'** and click **'Update'** until after you have met with the employee.

This means you can login and continue adding notes or ratings, through the meeting and after.

Be sure to keep the form **'In progress'** until after your meeting and you would like the employee to see your notes and ratings.

If you select **'Complete'** and **'Update'**, the employee will be able to see the Administrator/Manager notes and ratings.

Once you have completed your meeting and feel you've added the necessary notes, then you would select the **'Complete'** radio button and click **'Update'**.

**\*\*It is important that you only select 'Complete' and 'Update' after the meeting and once you feel that the Employee's Part B is complete.** Once you select 'Complete', the form will move to the Employee's Workflow and the next step which is Employee Sign-Off.

### **Step 3: Employee Sign-Off**

Once the...

- a) Part B meeting has taken place
- b) the form has been reviewed
- c) Administrator/Manager comments added
- d) competencies rated
- e) overall rating added
- f) Evaluator has selected 'Complete' & 'Update'

...the workflow will move back to the Employee to sign off. The Employee will be able to see the Administrator/Manager comments, notes, & ratings and will be requested to sign off on part B of the form.

### **Step 4: Evaluator Sign-Off**

You will receive an email once the Employee has signed off. It is now your turn to sign off.

Once back in your Workflow Inbox you will see the link to the next step, which is your sign off.

#### Workflow Inbox

ID	Form	Submitter	Step	Submitted
63	Performance Planning & Evaluation – BPVPA	Naran Malla	Evaluator Sign-Off Part B	15 mins ago

To sign off, enter your name and select the date near the bottom of the Part B form. Then select the Senior Management Team member you report to. (NOTE: If you are a Senior Management Team member, please select yourself)

Administrator/Manager Name \*

Date

MM	DD	YYYY
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Please select your Senior Management Team member \*

Finally click the '**Submit**' button on the top right in the Workflow box.

That's it. You have completed Part B and the form will be sent to the selected Senior Management Team member.

### Workflow

Entry ID: 63  
Submitted: October 5, 2021 at 10:36 pm  
Last updated: October 5, 2021 at 10:51 pm  
Submitted by: Naran Malla  
Status: Pending

**Evaluator Sign-Off Part B (Pending Input)**  
User: Lucky Saini (Pending)

Note

**SUBMIT**

**There are 9 Workflow steps for Part B:**

**For the evaluators, the highlighted Steps 2,3,4,5 & 7 require your attention on the site. The other steps are handled by the employee or senior management.**

1. Part B Entry by Employee
2. Part B Evaluator Approval - Part B If rejected go to 1b
  - 1b. Modification by Employee for part B - Go back to 1
3. Evaluator Notes / Competency Rating / Overall Rating - Used for Part B Meeting
4. Meet with the Employee
5. Select 'Complete' & 'Update' on the form to send to the Employee to sign off
6. Employee add overall comments and Sign off Part B
7. Evaluator Sign Off / Senior Management Team Selection Part B
8. Senior Management sign off
9. Superintendent sign off