



SilkRoad
technology



WingSpan Training Appraisals



Talent Management Solutions

recruiting | onboarding & life events | performance | learning | intranets | core hr

www.silkroad.com

What is WingSpan?

- Web based fully integrated performance solution
- IMSA is currently implementing the Performance Appraisal module
- Additional modules (that IMSA has purchased) include Goal Planning, Multi-Rater Feedback/360 reviews, and Succession Planning

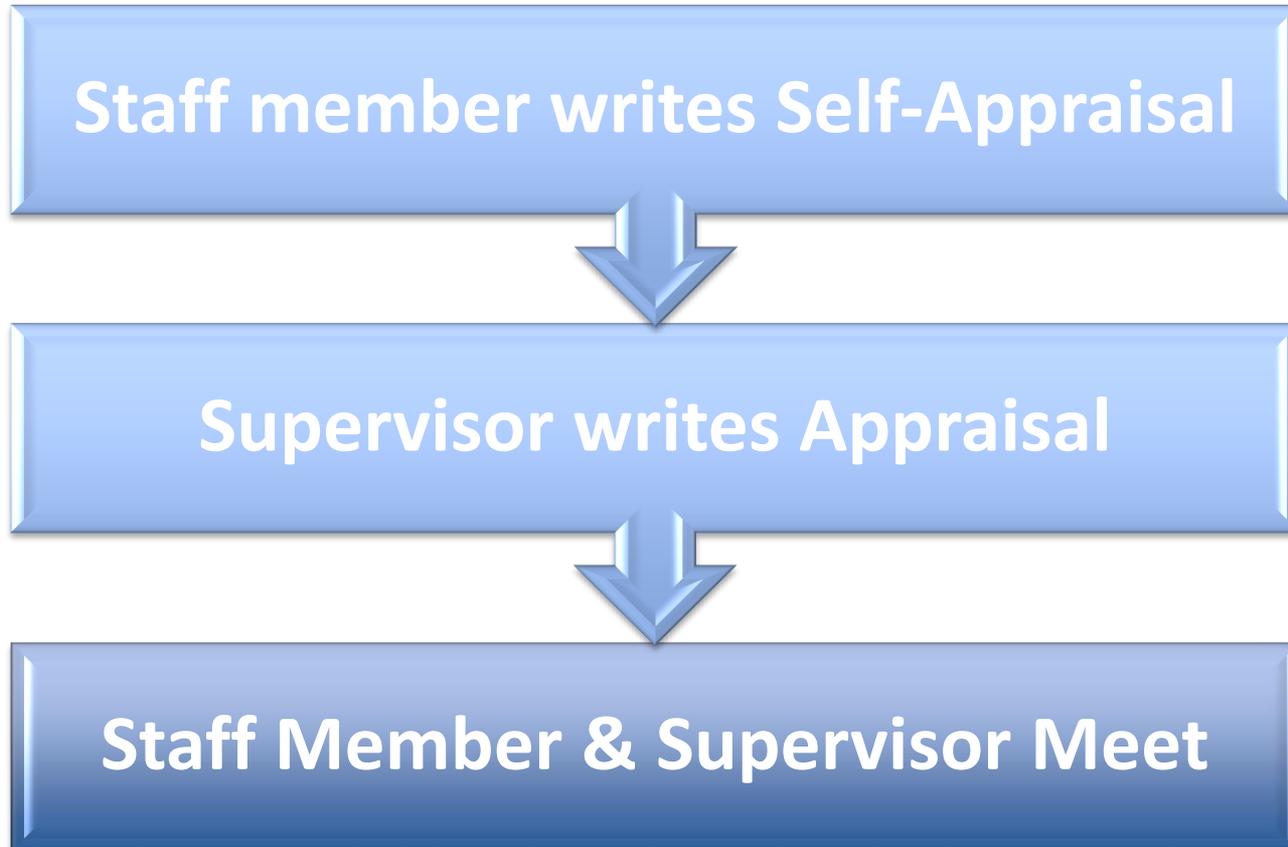
Advantages?

- Online tool provides ease of use for all users. No printing of documents required. The tool provides emails to trigger each task.
- When you have a task to complete, you will receive an email (Administrator: WingSpan)

Appraisals

- The following slides capture workflow of the Appraisal Process.
 - Each step will begin with a system generated email that will include a link to the site.
 - Each Individual's home page will list the task to complete and the words "Live and Untouched".

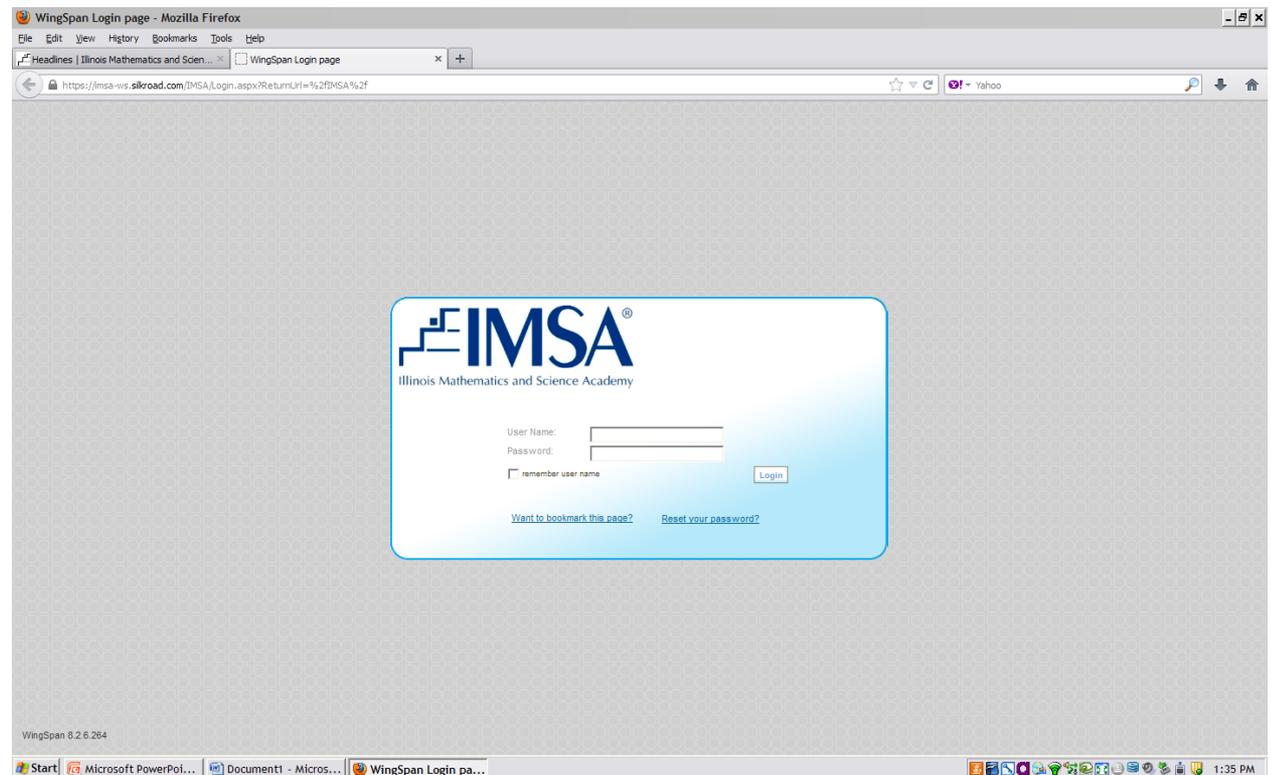
Appraisal Workflow



Wingspan Login

User Name: IMSA
e-mail address
including
“@imsa.edu”

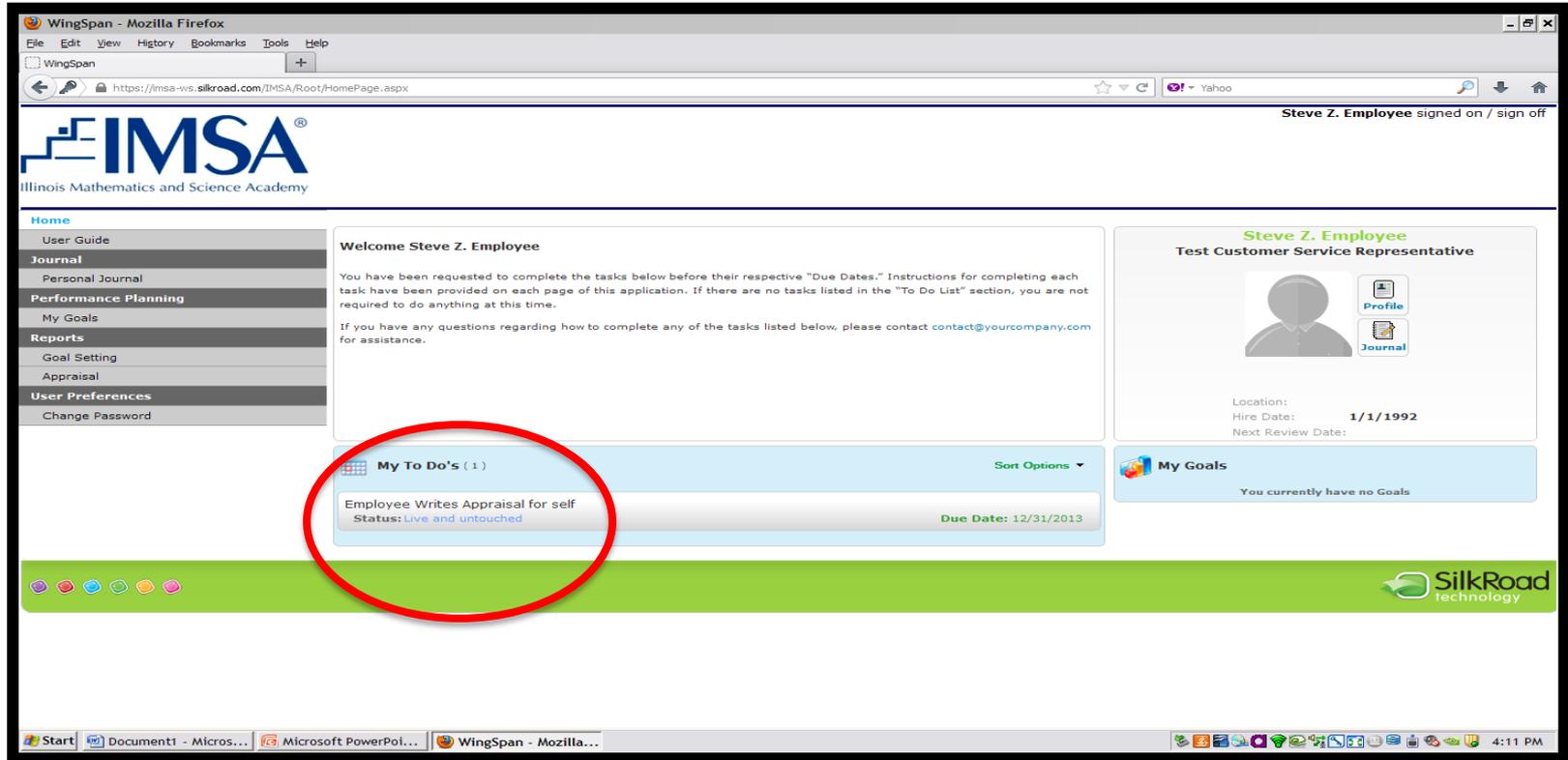
Password: enter
the password you
used last year or
click “Reset your
password”



Step 1

Self Appraisal

Staff Member's Home Page



The screenshot shows the WingSpan application interface in a Mozilla Firefox browser. The page is for a staff member named Steve Z. Employee. The main content area is titled "Welcome Steve Z. Employee" and contains instructions for completing tasks. A "My To Do's" section is highlighted with a red circle, showing a task: "Employee Writes Appraisal for self" with a status of "Live and untouched" and a due date of "12/31/2013". The right sidebar shows the user's profile, including their name, title, location, hire date, and next review date. The bottom of the page features the SilkRoad technology logo and a taskbar with various application icons.

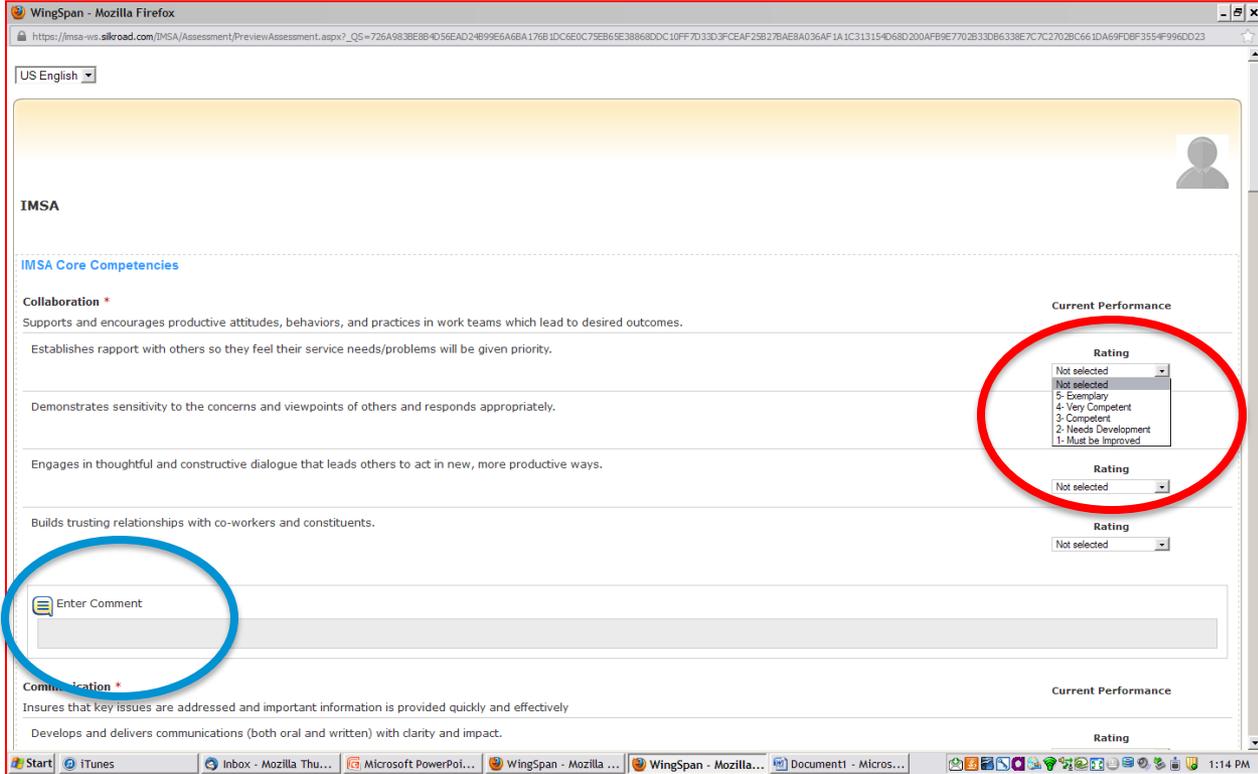
Staff member begins the Appraisal process by clicking on Live and untouched under Employee Writes Self Appraisal for self from My To Do's

Step 1

Self Appraisal

•Staff member chooses a rating from the drop down for each topic.

•Comments must be added at the end of the section.



The screenshot shows a web browser window titled "WingSpan - Mozilla Firefox" with the URL "https://imsa-ws.silkroad.com/IMSA/Assessment/PreviewAssessment.aspx?...". The page content includes a language selector set to "US English", a user profile icon, and the text "IMSA". Below this is the "IMSA Core Competencies" section. The first competency is "Collaboration *", which includes the description "Supports and encourages productive attitudes, behaviors, and practices in work teams which lead to desired outcomes." and three bullet points: "Establishes rapport with others so they feel their service needs/problems will be given priority.", "Demonstrates sensitivity to the concerns and viewpoints of others and responds appropriately.", and "Engages in thoughtful and constructive dialogue that leads others to act in new, more productive ways." To the right of this section is a "Current Performance" label and a "Rating" dropdown menu, which is circled in red. The dropdown menu is open, showing options: "Not selected", "5- Exemplary", "4- Very Competent", "3- Competent", "2- Needs Development", and "1- Must be Improved". Below the "Collaboration" section is an "Enter Comment" text area, which is circled in blue. The second competency, "Communication *", is partially visible at the bottom of the page.

IMSA Core Competencies

Staff will be evaluated on seven core competencies

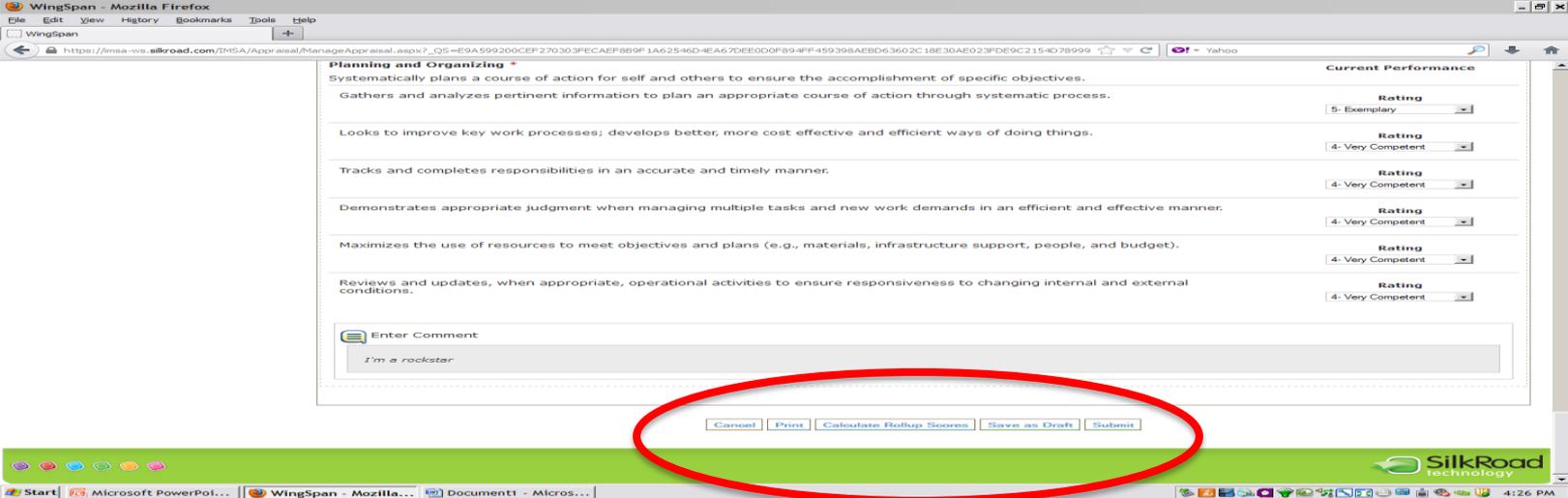
- Collaboration
- Communication
- Commitment to the Mission of the Academy
- Customer Service
- Diversity/Multiculturalism
- Judgment and Problem Solving
- Planning and Organizing

Rating Scale

- 3 = Almost always performs as described by the "Role Model" standards.
- 2 = Performs as described by the "Meets Expectations" standards. (Realistically, this is where most people should be rated in most behaviors/competencies)
- 1 = Almost always performs as described by the "Below Expectations" standards.

Step 1

Staff Member Completes Self Appraisal



WingSpan - Mozilla Firefox

https://msa-ws.silkroad.com/MSA/Appraisal/ManageAppraisal.asp?_QS=HE9A509200CEF270303FCEAEF869F1A62546D4EA67DEE0DF894FF459398AEBD63602C18E30AE023FDE9C2154D78999

Planning and Organizing *

Systematically plans a course of action for self and others to ensure the accomplishment of specific objectives.

Gathers and analyzes pertinent information to plan an appropriate course of action through systematic process.

Rating: 5- Exemplary

Looks to improve key work processes; develops better, more cost effective and efficient ways of doing things.

Rating: 4- Very Competent

Tracks and completes responsibilities in an accurate and timely manner.

Rating: 4- Very Competent

Demonstrates appropriate judgment when managing multiple tasks and new work demands in an efficient and effective manner.

Rating: 4- Very Competent

Maximizes the use of resources to meet objectives and plans (e.g., materials, infrastructure support, people, and budget).

Rating: 4- Very Competent

Reviews and updates, when appropriate, operational activities to ensure responsiveness to changing internal and external conditions.

Rating: 4- Very Competent

Enter Comment

I'm a rockstar

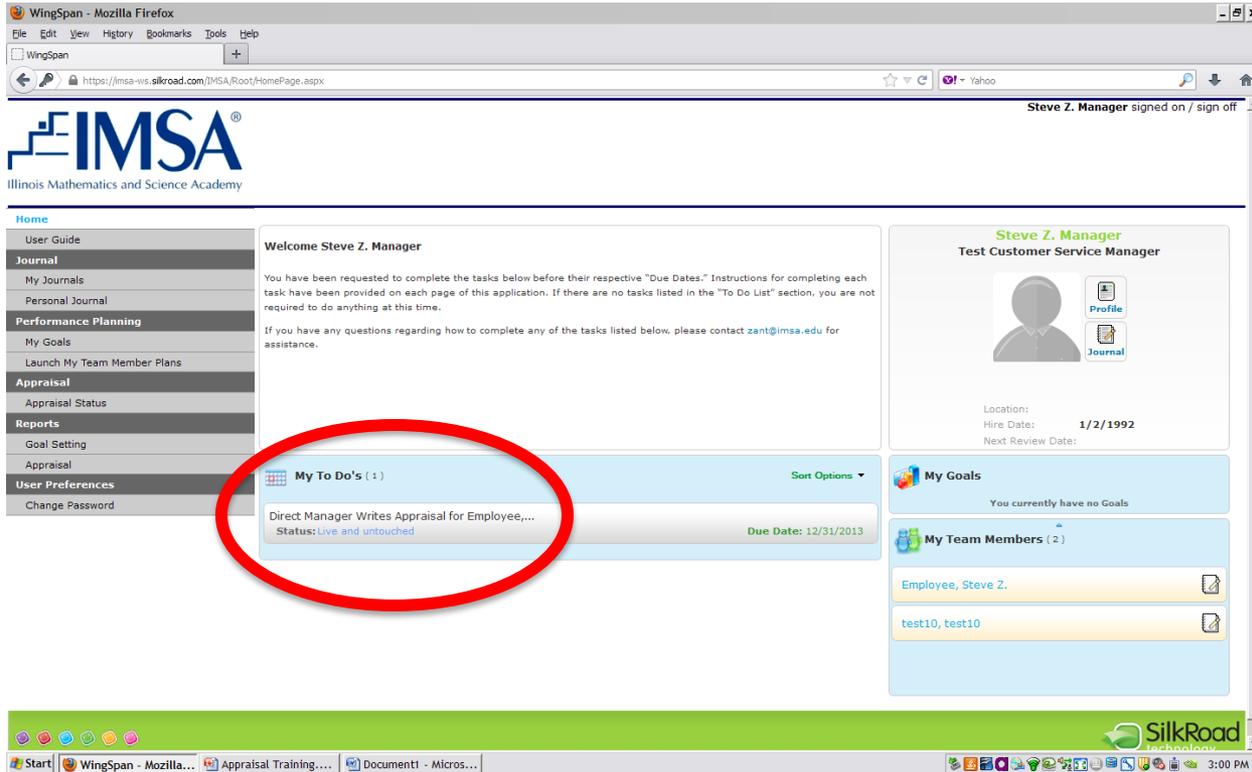
Cancel Print Calculate Rollup Scores Save as Draft Submit

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- *Cancel* – Exit the process
- *Print* – Allows you to print a copy for your records
- *Calculate Rollup Score* – Determine overall Appraisal score
- *Save as Draft* – Save Appraisal and return to Home Page
- *Submit* – Saves Appraisals and sends email to manager to complete step two

Step 2

Supervisor Home Page



WingSpan - Mozilla Firefox

File Edit View History Bookmarks Tools Help

WingSpan

https://imsa-vis.silkroad.com/IMSA/Root/HomePage.aspx

Steve Z. Manager signed on / sign off

IMSA
Illinois Mathematics and Science Academy

Home

- User Guide
- Journal
- My Journals
- Personal Journal
- Performance Planning
- My Goals
- Launch My Team Member Plans
- Appraisal
- Appraisal Status
- Reports
- Goal Setting
- Appraisal
- User Preferences
- Change Password

Welcome Steve Z. Manager

You have been requested to complete the tasks below before their respective "Due Dates." Instructions for completing each task have been provided on each page of this application. If there are no tasks listed in the "To Do List" section, you are not required to do anything at this time.

If you have any questions regarding how to complete any of the tasks listed below, please contact zant@imsa.edu for assistance.

My To Do's (1) [Sort Options](#)

Direct Manager Writes Appraisal for Employee, ...
Status: [Live and untouched](#) [Due Date: 12/31/2013](#)

Steve Z. Manager
Test Customer Service Manager

Profile
Journal

Location:
Hire Date: 1/2/1992
Next Review Date:

My Goals
You currently have no Goals

My Team Members (2)

Employee, Steve Z.

test10, test10

Start WingSpan - Mozilla... Appraisal Training... Document1 - Micros... 3:00 PM

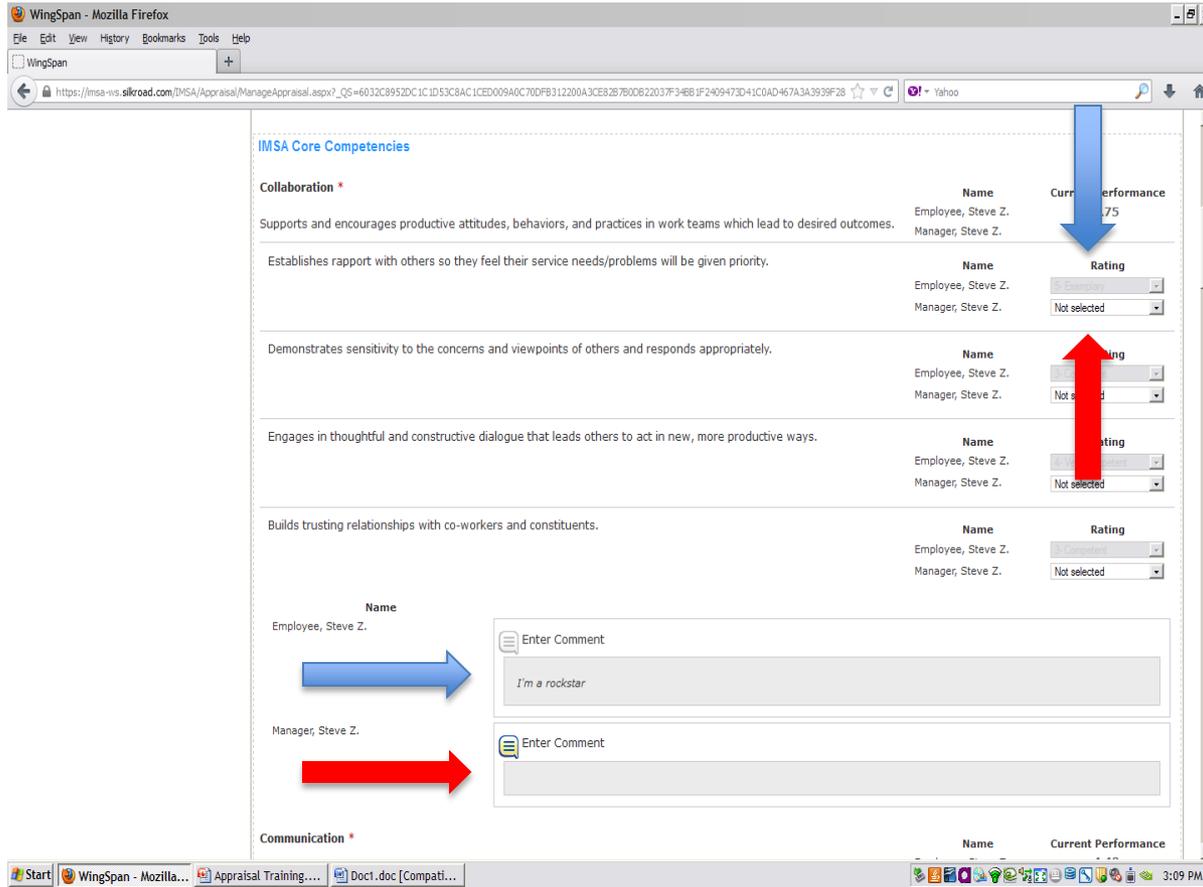
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Supervisor begins the process by clicking on Live and untouched under Direct Manager Writes Appraisal for "Employee Name" from the My To Do's

Step 2

Supervisor begins Appraisal

Supervisor views staff member's comments and rankings



WingSpan - Mozilla Firefox

File Edit View History Bookmarks Tools Help

WingSpan

https://imsa-vs.silkroad.com/IMSA/Appraisal/ManageAppraisal.aspx?_QS=6032C8952DC1C1D53C8AC1CED09A0C70DFB312200A3CE82B7800B22037F34EB1F2409473D41C0AD467A3A3939F28

Yahoo

IMSA Core Competencies

Collaboration *

Supports and encourages productive attitudes, behaviors, and practices in work teams which lead to desired outcomes.

Name	Current Performance
Employee, Steve Z.	75
Manager, Steve Z.	

Establishes rapport with others so they feel their service needs/problems will be given priority.

Name	Rating
Employee, Steve Z.	Competent
Manager, Steve Z.	Not selected

Demonstrates sensitivity to the concerns and viewpoints of others and responds appropriately.

Name	Rating
Employee, Steve Z.	Competent
Manager, Steve Z.	Not selected

Engages in thoughtful and constructive dialogue that leads others to act in new, more productive ways.

Name	Rating
Employee, Steve Z.	Competent
Manager, Steve Z.	Not selected

Builds trusting relationships with co-workers and constituents.

Name	Rating
Employee, Steve Z.	Competent
Manager, Steve Z.	Not selected

Communication *

Employee, Steve Z.

Enter Comment

I'm a rockstar

Manager, Steve Z.

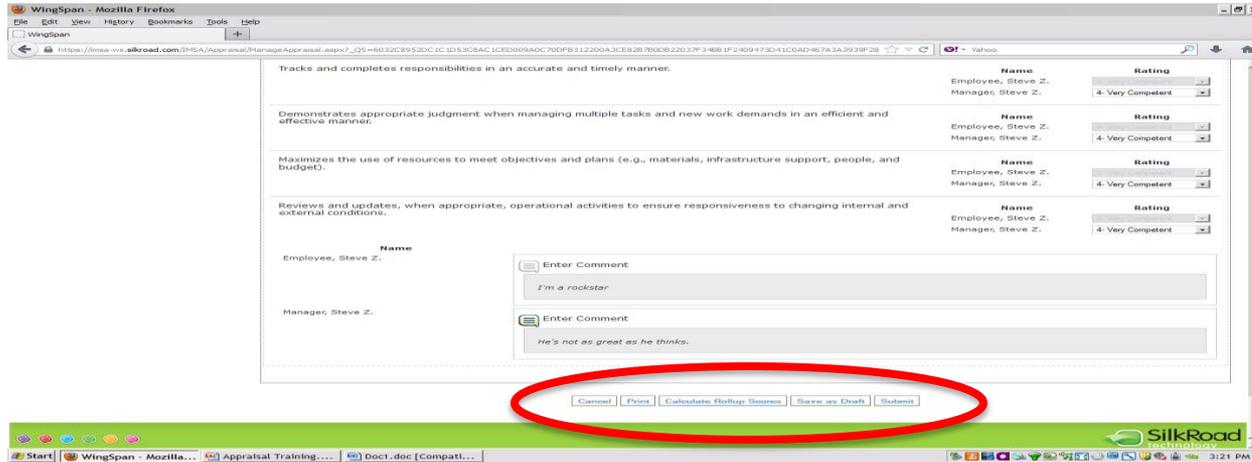
Enter Comment

Start WingSpan - Mozilla... Appraisal Training... Doc1.doc [Compati... 3:09 PM

Supervisor rates staff member and **must** enter comments at end of section.

Step 2

Supervisor Completes Appraisal for Employee



Tracks and completes responsibilities in an accurate and timely manner.

Name	Rating
Employee, Steve Z.	4. Very Competent
Manages, Steve Z.	4. Very Competent

Demonstrates appropriate judgment when managing multiple Tasks and new work demands in an efficient and effective manner.

Name	Rating
Employee, Steve Z.	4. Very Competent
Manages, Steve Z.	4. Very Competent

Maximizes the use of resources to meet objectives and plans (e.g., materials, infrastructure support, people, and budget).

Name	Rating
Employee, Steve Z.	4. Very Competent
Manages, Steve Z.	4. Very Competent

Reviews and updates, when appropriate, operational activities to ensure responsiveness to changing internal and external conditions.

Name	Rating
Employee, Steve Z.	4. Very Competent
Manages, Steve Z.	4. Very Competent

Employee, Steve Z.
Manages, Steve Z.

Enter Comment
I'm a rockstar

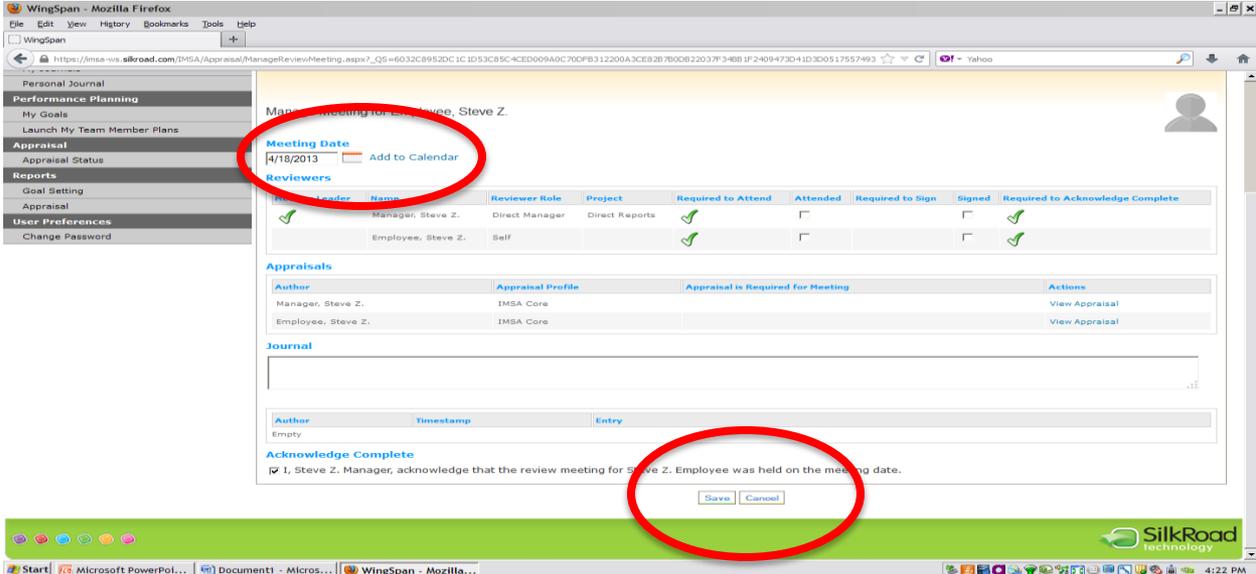
Enter Comment
He's not as great as he thinks.

Cancel | Print | Calculate Rollup Scores | Save as Draft | Submit

- *Cancel* – Exit the process
- *Print* – Allows you to print a copy for your records
- *Calculate Rollup Score* – Determine overall Appraisal score
- *Save as Draft* – Save Appraisal and return to Home Page
- *Submit* – Saves Appraisals and sends email to supervisor's supervisor to complete step three

Step 3

Supervisor sets up Meeting



Meeting Date: 4/18/2013 [Add to Calendar](#)

Reviewer	Name	Reviewer Role	Project	Required to Attend	Attended	Required to Sign	Signed	Required to Acknowledge Complete
<input checked="" type="checkbox"/>	Manager, Steve Z.	Direct Manager	Direct Reports	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Employee, Steve Z.	Self		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Appraisals

Author	Appraisal Profile	Appraisal is Required for Meeting	Actions
Manager, Steve Z.	IMSA Core	<input type="checkbox"/>	View Appraisal
Employee, Steve Z.	IMSA Core	<input type="checkbox"/>	View Appraisal

Journal

Author	Timestamp	Entry
Empty		

Acknowledge Complete

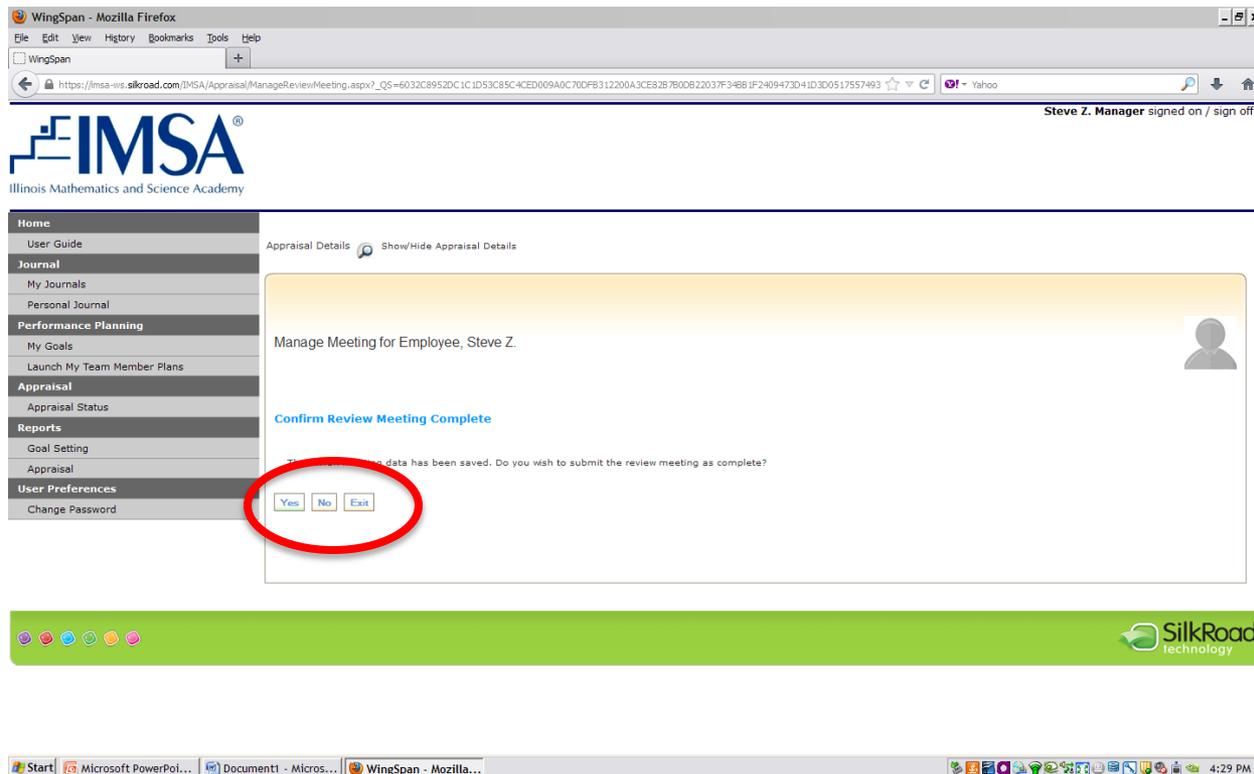
I, Steve Z., Manager, acknowledge that the review meeting for Steve Z., Employee was held on the meeting date.

[Save](#) [Cancel](#)

Verify the meeting date, click Confirm, and schedule in IMSA Webcalendar

Step 3

Supervisor Meeting Confirmation Page



The screenshot shows a web browser window titled "WingSpan - Mozilla Firefox" displaying the IMSA (Illinois Mathematics and Science Academy) appraiser interface. The user is logged in as "Steve Z. Manager". The main content area shows a confirmation dialog for a review meeting for employee "Steve Z.". The dialog text reads: "Manage Meeting for Employee, Steve Z." followed by "Confirm Review Meeting Complete" and "The review meeting data has been saved. Do you wish to submit the review meeting as complete?". At the bottom of the dialog, there are three buttons: "Yes", "No", and "Exit", which are circled in red. The left sidebar contains navigation links for Home, User Guide, Journal, Performance Planning, Appraisal, Reports, and User Preferences. The bottom of the browser window shows the Windows taskbar with the Start button, open applications (Microsoft PowerPoint, Document - Micros..., WingSpan - Mozilla...), and the system tray with the time 4:29 PM.

Things to remember...

- Annual Appraisals are an employment expectation and must be completed in a **timely manner**
- Use specific examples and situations to support the Appraisal
- “Meets Expectations” is not a bad rating. It’s where most people should be rated in most behaviors/competencies
- You don’t have to complete the Appraisal in 1 day
- You do have a **deadline**



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Thank You!!!



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