



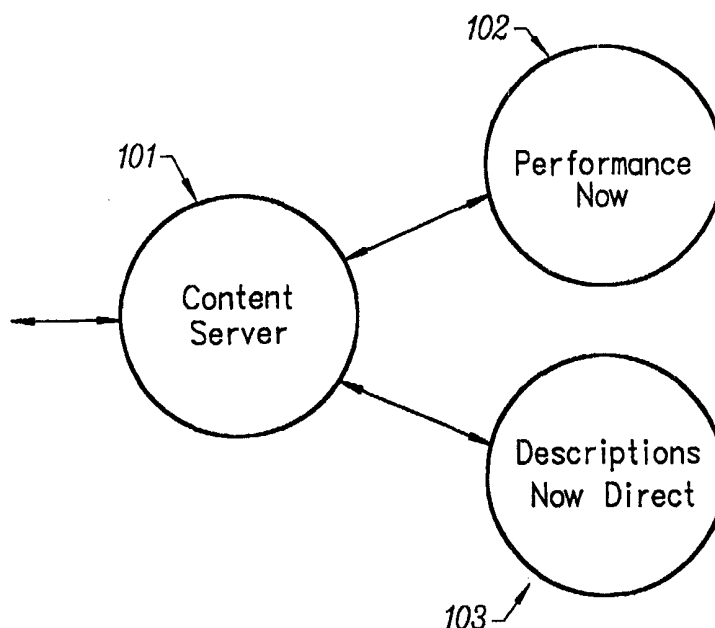
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(54) Title: PERFORMANCE REVIEW AND JOB DESCRIPTION SYSTEM

(57) Abstract

A performance review and job description system that allows users to create professional job descriptions and employee performance reviews across the Internet. The invention comprises a performance review module and a job description module and places the applications online through a content, or Web, server. Access to each module is through a Universal Resource Locator (URL) that points to the content server and sessions are kept open until the user receives his completed document. Users pay for each job description or performance review on a pay-per-use basis or subscribe to the service for a specific amount of time. The performance review module walks users through writing a performance review in a step-by-step process, offering expert advice at every step of the process. Employee information, competencies, goals, and ratings are entered into the system by the user with meaningful supporting and summary statements automatically generated. The job description module helps the user write a professional job description. The user selects a job from the invention's extensive Job Library which contains pre-written Job Summaries and pre-defined Duties & Responsibilities sections. The invention prompts the user to answer some relevant questions addressing the job's Supervisory Responsibilities, Qualification Requirements, Physical Demands, and Work Environment and automatically constructs the text based on the answers provided. The final performance review or job description document is assembled on the fly and delivered to the user by direct download or email delivery in Rich Text Format (RTF), text only, or Hypertext Markup Language (HTML) format.



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Performance Review and Job Description System

5

BACKGROUND OF THE INVENTION

TECHNICAL FIELD

10 The invention relates to the documentation of employee performance and job descriptions in a computer environment. More particularly, the invention relates to the creation of employee job performance evaluations and job descriptions across a computer network in a computer environment.

15

DESCRIPTION OF THE PRIOR ART

Employee performance reviews and job descriptions are difficult and time consuming to write. Starting with a blank page produces inconsistent and
20 inappropriate results which makes the process laborious and ineffective in providing quality feedback to employees.

The task of writing performance reviews is generally put off because of its tedious nature and is written under the pressure of getting the review completed on time.
25 Creating consistent, quality job descriptions is also a task that is problematic because style guidelines are implemented and interpreted differently by each employee writing the job description.

Traditional software must reside either on a desktop computer (to be accessible by a single user) or a Network Server (to be accessed by an entire organization).
30 This requires installing the software from a CD or disk and then configuring it to work on each desktop needing access to the software.

Purchasing, installing, configuring and training all feed the enormous cost of
35 implementing a new piece of software. Hardware upgrades to run the new application, as well as upgrades to the application itself, further burden the organization with both definable and hidden costs. Even implementing today's

server resident Web applications takes planning, forethought, installation, and maintenance. All of this places a significant barrier between the company and the solution.

- 5 Existing approaches evaluate the individual by testing his behavioral or task-processing skills. U.S. Pat. No. 5,551,880 issued to Bonnstetter et al. on 3 September 1996, describes a system that utilizes behavioral and values information from an individual to predict specific job performance potential.
- 10 Additionally, U.S. Pat. No. 5,326,270 issued to Ostby et al. on 5 July 1994, describes a system for evaluating the task-processing style of an individual by presenting that individual with a simulated situation and recording the individual's responses while resolving the situation.
- 15 These methods teach the direct evaluation of an individual using an outside stimulus and not the creation of a job performance evaluation by another.

- Other methods deal with the problems associated with distributing common documents for feedback from multiple individuals. U.S. Pat. No. 5,706,452 issued
- 20 to Ivanov on 6 January 1998, describes a method for structuring the process of participatory document evaluation by a plurality of reviewers utilizing a feed-forward synchronization schema defined as a workflow graph construct.

- However, these approaches do not address the problems of creating consistent
- 25 employee reviews and job descriptions in a timely manner. Further, the problems of providing company-wide access across divergent platforms and installing, maintaining, and upgrading software versions of the job review and description applications are also not addressed.

- 30 It would be advantageous to provide a performance review and job description system that uses built-in intelligence to write a fully-formatted employee review or job description in minutes, offers immediate access when the need arises, is extremely easy to use, and is cost-effective for infrequent use, thus freeing up company resources. It would further be advantageous to provide a performance
- 35 review and job description system that takes advantage of the Internet, thereby allowing it to be independent of the user's computer systems and support personnel.

SUMMARY OF THE INVENTION

The invention provides a performance review and job description system. The invention utilizes an easy to use interface to create employee performance reviews and job descriptions across a computer network, such as the Internet, thus creating an application platform that is not dependent upon the user's computer platform or support personnel. In addition, the invention provides a system that allows the user to pay for each use of the invention rather than purchasing the entire product, thereby decreasing the user's costs.

A preferred embodiment of the invention allows users to create professional job descriptions and employee performance reviews across the Internet. Users have instant access to the full functionality of a traditional desktop application on an as-needed basis using only their Web browser. This maximizes real-time user response and enables the provider to implement immediate feature enhancements to the users.

The invention comprises a performance review module and a job description module and places the applications online through a content, or Web, server. Online applications do not require any installation. The code that controls the software runs on a Web server and, with no configuration, can be accessed by thousands of users simultaneously through their Web browsers.

Access to each module is through a Universal Resource Locator (URL) that points to the content server. The invention generates Web pages for the user based on his responses to a question and answer process. The documents that are created by the performance review and job description online applications do not reside on the Web server. Each selection made while using an application writes the result into a single field in an online database. The pieces of data are assembled in a readable format is when the user executes the command to receive his results.

A session is kept open until the user receives his completed document via download or e-mail. If the user loses his connection with the content server before he finishes, just logging in with his ID and password will take him back to the last place he occupied before his connection was dropped. The online applications will remember all of the information that the user entered up to the point where he lost his connection. The invention uses "cookies" to establish each user as a unique visitor and to track his activities during an open session.

Users pay for each job description or performance review on a pay-per-use basis or subscribe to the service for a specific amount of time.

5 The performance review module walks users through writing a performance review in a step-by-step process, offering expert advice at every step of the process. Employee information, competencies, goals, and ratings are entered into the system by the user. The application takes the user's input and automatically generates meaningful supporting and summary statements.

10 The job description module helps the user write a professional job description in just a few minutes. The user selects a job from the invention's extensive Job Library which contains pre-written Job Summaries and pre-defined Duties & Responsibilities sections for over 3,700 job titles. The invention prompts the user to answer some relevant questions addressing the job's Supervisory
15 Responsibilities, Qualification Requirements, Physical Demands, and Work Environment. The application then automatically constructs the text based on the answers provided.

20 The final performance review or job description document is assembled on the fly and delivered to the user by direct download or email delivery in Rich Text Format (RTF), text only, or Hypertext Markup Language (HTML) format.

Other aspects and advantages of the invention will become apparent from the following detailed description in combination with the accompanying drawings,
25 illustrating, by way of example, the principles of the invention.

BRIEF DESCRIPTION OF THE DRAWINGS

30 Fig. 1 is a block schematic diagram of the major components of the invention according to the invention;

Fig. 2 is an example of a table of numeric review levels and their associated default and alternate names according to the invention;

35

Fig. 3 is an example of a table of performance criteria and their associated alternate names and factors according to the invention;

Fig. 4 is a block schematic diagram of a high-level application flow chart for the performance review module of the invention according to the invention;

5 Fig. 5 is a block schematic diagram of a high-level application flow chart showing additional steps for the performance review module of the invention according to the invention;

10 Fig. 6 is a block schematic diagram of an application flow chart for the performance review module of the invention with examples of user menus according to the invention;

15 Fig. 7 is a block schematic diagram of an application flow chart showing additional steps for the performance review module of the invention with examples of user menus according to the invention;

Fig. 8 is a block schematic diagram of an application flow chart showing additional steps for the performance review module of the invention with examples of user menus according to the invention;

20 Fig. 9 is a block schematic diagram of an application flow chart showing additional steps for the performance review module of the invention with examples of user menus according to the invention;

25 Fig. 10 is a block schematic diagram of an application flow chart for the performance review module of the invention with examples of user menus including the multi-rater plug-in module according to the invention;

30 Fig. 11 is a block schematic diagram of an application flow chart showing additional steps for the performance review module of the invention with examples of user menus including the multi-rater plug-in module according to the invention;

Fig. 12 is a block schematic diagram of a high-level application flow chart for the job description module of the invention according to the invention;

35 Fig. 13 is a block schematic diagram of a high-level application flow chart showing additional steps for the job description module of the invention according to the invention;

Fig. 14 is a block schematic diagram of a screenshot of the administrator password entry area according to the invention;

5 Fig. 15 is a block schematic diagram of a screenshot of the password lookup screen according to the invention;

Fig. 16 is a block schematic diagram of a screenshot of the password lookup user information screen according to the invention;

10 Fig. 17 is a block schematic diagram of a screenshot of the password lookup user information screen according to the invention;

Fig. 18 is a block schematic diagram of a screenshot of the Form Designer entry area according to the invention;

15 Fig. 19 is a block schematic diagram of a screenshot of the Form Designer form creation screen according to the invention;

20 Fig. 20 is a block schematic diagram of a screenshot of the Form Designer competency selection area according to the invention;

Fig. 21 is a block schematic diagram of a screenshot of the Form Designer competency name assignment screen according to the invention;

25 Fig. 22 is a block schematic diagram of a screenshot of the Form Designer rating screen according to the invention;

Fig. 23 is a block schematic diagram of a screenshot of the Form Designer completion screen according to the invention;

30 Fig. 24 is a block schematic diagram of a screenshot of the Form Designer form change screen according to the invention;

35 Fig. 25 is a block schematic diagram of a screenshot of a company information entry screen according to the invention;

Fig. 26 is a block schematic diagram of a screenshot of an example of a welcome screen according to the invention;

Fig. 27 is a block schematic diagram of a screenshot of a user account setup screen according to the invention;

5 Fig. 28 is a block schematic diagram of a screenshot of the successful account setup screen according to the invention;

Fig. 29 is a block schematic diagram of a screenshot of the maximum user limit exceeded screen according to the invention;

10 Fig. 30 is a block schematic diagram of a screenshot of the user entry screen for the performance review module according to the invention;

15 Fig. 31 is a block schematic diagram of a screenshot of the user form selection screen for the performance review module according to the invention;

Fig. 32 is a block schematic diagram of a screenshot of the user performance rating screen for the performance review module according to the invention;

20 Fig. 33 is a block schematic diagram of a screenshot of the user goal rating screen for the performance review module according to the invention;

Fig. 34 is a block schematic diagram of a screenshot of the user review summary screen for the performance review module according to the invention;

25 Fig. 35 is a block schematic diagram of a screenshot of the user plans for improvement selection and overall rating screen for the performance review module according to the invention;

30 Fig. 36 is a block schematic diagram of a screenshot of the user plans for improvement selection screen for the performance review module according to the invention;

35 Fig. 37 is a block schematic diagram of a screenshot of the user final preview screen for the performance review module according to the invention; and

Fig. 38 is a block schematic diagram of a screenshot of the user document download options screen for the performance review module according to the invention.

DETAILED DESCRIPTION OF THE INVENTION

5 The invention is embodied in a performance review and job description system in a computer environment. A system according to the invention provides an easy to use interface to create employee performance reviews and job descriptions across a computer network, such as the Internet, thus creating an application platform that is not dependent upon the user's computer platform or support personnel. In addition, the invention provides a system that allows the user to pay
10 for each use of the invention rather than purchasing the entire product, thereby decreasing the user's costs.

A preferred embodiment of the invention allows users to create professional job descriptions and employee performance reviews across the Internet. Users have
15 instant access to the full functionality of a traditional desktop application on an as-needed basis using only their Web browser. This maximizes real-time user response and enables the provider to implement immediate feature enhancements to the users.

20 Intranet development is costing companies millions of dollars because they are trying to get back to the functionality that they had before they "standardized." Many small to medium sized companies are looking for non-proprietary solutions which include outsourcing, or development of the Extranet, to provide rich content to users rather than costly in-house development.

25 The invention allows a company to simply place an icon on the computer desktop with a Universal Resource Locator (URL) that points to the content server. This gives every user instant access to a functional software application that addresses a very specific business need. Not only is it easy for Information Services (IS) to
30 administrate (no more upgrades or unique user installation problems to sleuth), but the cost savings alone of outsourcing content can make Intranets affordable for small and medium sized companies.

35 Traditional software must reside either on a desktop computer (to be accessible by a single user) or a Network Server (to be accessed by an entire organization). This requires installing the software from CD or disk and then configuring it to work on each desktop computer that needs access to the software.

Referring to Fig. 1, the invention comprises a performance review module (Performance Now) 102 and a job description module (Descriptions Now Direct) 103 and places the applications online through a content, or Web, server 101. Online applications do not require any installation. The code that controls the software runs on a Web server and, with no configuration, can be accessed by thousands of users simultaneously through their Web browsers. This means providing company-wide access to online applications can be authorized for thousands of users across divergent platforms (Mac, PC, Unix, etc.) and geographic locations simply by activating a corporate subscription.

The invention generates Web pages for the user based on his responses to a question and answer process. The Web pages do not exist in a static environment, but are created on the fly to give each user a unique, interactive experience.

A session is kept open until the user receives his completed document via download or e-mail. If the user loses his connection with the content server before he finishes, just logging in with his ID and password will take him back to the last place he occupied before his connection was dropped. The online applications will remember all of the information that the user entered up to the point where he lost his connection.

The invention uses "cookies" to establish each user as a unique visitor and to track his activities during an open session. A "cookie" is a term given to any data file that is written to the user's local hard drive by a Web server as a result of logging onto a Web page. That file remains on the user's hard drive. It can tell the Web site something about the user during the time he is visiting the site, or the next time the user logs on, if the "cookie" has not expired. Often "cookies" are used to remember the user's name or other information so he does not have to enter it more than once when filling out online forms.

The cookie consists of a computer-generated number that is both unique and very cryptic. The computer-generated number is the key to allowing the user to return to previous screens. The invention uses the number to display the user's choices and build the final document. The cookie also allows the content server to return the user to his last location if he loses his Internet connection during a session. Cookies can expire after a certain amount of time, for example, 24 hours. That is, the data file that is written to the user's hard drive automatically deletes itself 24 hours after the user receives his final document.

The Web servers are secure from outside access. The documents that are created by the performance review and job description online applications do not reside on the Web server. In fact, they do not reside anywhere. Each selection
5 made while using an application writes the result into a single field in an online database. The only time all of those pieces of data come together in a readable format is when the user executes the command to receive his results. Until that point the results of the user's selections are just random bits of data in a database and are not associated with any individual. Only the user can execute the
10 command to put the pieces of data together because only the user has the session ID (cookie) that is required for the server to build the final document.

When a user or corporation needs to accomplish a task with software it must first decide which product to purchase, then find where it can be purchased or
15 downloaded, configure it, and learn how to use it all before addressing the task at hand. Web-enabled software using a browser as an interface allows results to be placed in the user's hands faster than the user can currently download other software solutions. Users pay for each job description or performance review on a pay-per-use basis or they can subscribe to the service for a specific amount of
20 time, *e.g.*, six or 12 months.

Pay-per-use is efficient because most professionals need access to the invention quickly and for a short period of time. In most companies, using software means researching, outsourcing, procuring, downloading, installing, configuring, training, and
25 possibly upgrading before even using the software. The costs associated with the evaluation team, procurement department, administration staff, IS, end-user training, and upgrades to software and hardware make pay-per-use extremely attractive.

30 When an organization decides to use the invention, a unique URL Web address and a dedicated entry point on the Web are created. The invention creates a single Web page that acts as the entry point for an unlimited number of companies, each with its own corporate look, feel and functionality.

35 Installation is thing of the past. To provide the online applications to other corporate users, the administrator simply sends an email message to them with the corporate subscription Web address. Once a user logs onto the Web site he can set a bookmark in his browser to return him to the site as needed. By creating

a batch email that goes out to all users in one send, the corporate administrator has the application "installed" company-wide in just a matter of minutes.

5 In order to provide functionality to the largest number of users, a preferred embodiment of the invention pushes popular standards such as HTML and Java to the user's Web browser. This allows the online applications to run on any Web browser, resulting in fast, reliable interactivity without the need for plug-ins or upgraded browser versions. It also provides interactive applications with low band-width requirements making them ideal for Internet delivery.

10 Individual users create their own ID and password to ensure secure access to their customized version of the application. Upon entering the site, pre-defined performance review forms and other selected features are presented to provide a truly unique version of the application, delivered on a mass scale.

15 There is no software to download, nothing to install and access to the application requires only a Web browser. Gone are the days of complicated installation, multiple user setup and ongoing upgrades. Now, each time a user logs onto the site, the latest version of the application is available with no burden placed on the user or the company's Information Technology (IT) department.

20 A live, hosted site can be produced within hours of receiving the company's account. The subscribing company is provided with a password-protected administration area for the creation of performance review forms, user password maintenance and default company information entry. Prior to announcing the availability of the application, the system administrator is presented with a form-design wizard that allows him to customize review forms for his organization in just minutes. An organization can have thousands of users accessing the software and writing performance reviews immediately, with a broadcast e-mail directing users to the entry point URL.

25 The invention walks users through writing a performance review in a step-by-step process offering expert advice at every step of the process. The invention provides a minimal learning curve, instant access across a diverse corporate landscape and absolutely no reliance on internal IS resources or existing infrastructure.

The Performance Now module is an Internet-based software using built-in intelligence to help managers write employee performance reviews. It has two components, the Performance Appraiser and the Performance Manager.

- 5 Users select competencies to evaluate and rate those competencies on a scale of one to five. Each numeric rating is associated with a set of default and alternate names that the system administrator selects for the actual review form. For example, referring to Fig. 2, the level five 201 as a range of 4.75 - 5.00 202 and is associated with a default rating of Outstanding 203 and alternate names such as
10 Always 204, Commendable 205, and Consistently Superior 206.

Additionally, the administrator selects performance criteria for the user to choose from. With respect to Fig. 3, the performance criteria "adaptability" 301 can have alternate names such as "ability to learn new skills" 302, "flexibility" 303, or
15 "versatility" 304. Adaptability 301 also has factors associated with it such as "adapts to changes in the work environment" 305.

The application takes the user's input and generates meaningful supporting statements called Intellitext. It also creates sections for addressing Goals, Plans for
20 Improvement, and a review Summary.

The final review document is delivered to the user by direct download or email delivery in Rich Text Format (RTF), text only, or HTML format.

25 RTF is generally associated with word processing documents. RTF retains text attributes, such as bold and italic, as well as spacing and text formatting attributes. The user can open an RTF document in his word processor and it will retain the same look it had when he completed it.

30 HTML stands for HyperText Markup Language. This is the way text is coded to be displayed in a Web Browser. An HTML-formatted document is ready to be posted on a Website or Intranet.

With respect to Figs. 4 and 5, the user accesses the content server 403 through
35 the Internet 402 using his Web browser 401 and the supplied URL for his company. The user's account is determined 404 and the appropriate login page is presented to the user 406. The user logs onto the content server using his ID and password or name and email address 409.

Once the user has logged on, the appropriate menu of forms is then presented to the user 410. Employee information, goals, and ratings are entered into the system by the user 413. The user selects each competency and rates it, with Intellitext descriptions created automatically for each competency rated 414, 420, 421. Goals are rated 501, as well as selecting improvement ideas 503.

A summary statement for the review is selected based on the overall rating of the employee 505. The user then has the option to review and/or modify the final results 507. The user selects the format and delivery options for the final copy of the review 508. The document is then assembled on the fly 509 and delivered to the user 510.

Some of the features available in the Performance Review module are:

- Unique URL (Web site address) for secure, password protected access
- Corporate branding throughout the site
- Password-protected system administrator area features:

Form Designer

With Form Designer the system administrator can create up to five customized performance review forms for the organization.

Users can:

- Select from 32 available performance competencies to be included on the form
- View the associated factors that will be rated for each competency
- Re-name the chosen competencies to fit their needs
- Re-name the section headings (Performance Competencies, Goals, Plans for Improvement, Summary)
- Designate a form name that will appear on the form selection menu

Password administration

Allows the system administrator to look up and change user ID's and passwords by entering the user's name.

Company Information Screen

5 Allows the system administrator to enter the default company information that will populate user account set up screens and be displayed at the top of the performance review document.

- Self-serve user sign up area:

10 Allows users to create password-protected accounts for access from anywhere. By entering their own name, user ID and password, users can set up secure access to the online applications.

Feature	Benefit
15 Internet delivery	Instant access anytime, anywhere.
Runs on our server	Always the current version. Nothing to download or install. No IS involvement in roll out.
20 Accessed by any HTML-capable Web Browser	Cross-platform compatible - will run on any OS (Mac, PC, Unix). Fast, interactive and intuitive application.
25 Wizard format	Easy to use - no steep learning curve.
Online Form Designer	Allows replication of any form.
30 Administration Area	Look up user passwords, create forms and maintain default company information.
Self-serve user sign up area	Easy account set up with no IS Involvement.
35	

Referring to Figs. 6, 7, 8, and 9, a more detailed operational flow of the Performance Now module with menu choices is shown. The user accesses the content server 603 through his Intranet or Internet connection 602 by using his

Web browser 601 and the supplied URL or custom desktop icon for his company.

The user's company information is determined using the endpoint URL 604.

5 Company data and custom theme data are retrieved from the content server databases 605. The company's Performance Now home page is presented to the user 608 containing the menu options for writing a review or entering/updating user information 609.

10 When the user selects the desired option, the appropriate login page is presented to the user 610. The user logs onto the content server using his ID and password or name and email address 611. The user's ID is verified and the appropriate privileges, session variables, and defaults are set 612.

15 The available list of employees is retrieved from the database 616. The list is presented to the user to select a specific employee or create a new employee record 618. The desired employee record is retrieved and displayed 701. The user can update or create an employee record 703. Any changes are saved 704.

20 Previous reviews, if any, are retrieved for the employee 706. The user is given the choice to start a new review or to continue a previous review 709, if one exists. A new review is created or the data from a previous review are retrieved and displayed to the user 710. The user selects each competency and rates it, with
25 Intellitext descriptions created automatically for each competency rated 715, 721, 722.

Goals are selected and rated by the user 801, 803, 804. The ratings for the competency elements and goals are totaled 806. Summary statement text choices are created and presented to the user for selection 809. The user then
30 selects which elements or goals need plans for improvement/coaching ideas sections 812, 814, 815. Plans for improvement/coaching ideas for each competency element are selected by the user 901, 903, 904.

The user is presented with the final choices at the completion of entering data for
35 the review 907, 908. A preview of the final review can be selected and the data is assembled and presented to the user 909. Rating text and numeric ratings can be modified by the user 911. A summary statement for the review is selected based on the overall rating of the employee. Other options can be selected for ratings, goals, summary statements, and improvements are also available 913.

The user selects the format and delivery options for the final copy of the review 916, 917. The document is then assembled on the fly 918 and delivered to the user 919, 920.

- 5 The Performance Now module provides users with an easily accessible tool for writing solid employee performance reviews. Form Designer allows users to select the Performance Criteria to rate and define how those ratings will be displayed on the performance review form. The Rating Matrix allows users to assign a high/low rating to various Performance Factors that contribute to the
- 10 Performance Criteria. Intellitext ensures proper language is used to translate the Performance Factor ratings into clear, natural text.

- The Performance Wizard walks users through the process of creating a performance review. Ask the Expert offers users expert advice in critical areas of
- 15 the performance review process. Interactive Advice offers online warning messages to alert users when ratings seem to conflict or when it is important to back ratings with supporting examples.

- With respect to Figs. 10, and 11, the Multi-Rater add-on module to the
- 20 Performance Now application allows the gathering of non-anonymous feedback from other users. The user logs onto the content server 1003 in the usual manner described above using his Web browser 1001. The type of feedback requested from other users will be set by the primary reviewer (the person initiating the review and feedback process) and be available to the primary reviewer when the
- 25 feedback process has been completed. Users will be notified that their feedback has been requested by email (if available) as well as via an "action list." The action list 1018 contains a list of requests for feedback (if any exist) and is displayed when either Performance Appraiser or Performance Manager is run.

- 30 Setting up requests for feedback is accomplished in the Performance Appraiser on a "Multi-Rater Options" tab 1101 and is review-specific. In other words, the user will select the Multi-Rater option to gather feedback and will specify from whom on a review-by-review basis. Additionally, the user can create and retain a "buddy list" of other users that he frequently requests feedback information from.

35

The user has the ability to request any or all of the following types of feedback information from other users: Comments, Element Ratings, and Goal Ratings. The user can also identify the specific elements and/or goals that he wants feedback

information on for each user that is selected to give feedback. Other options include allowing the feedback-giver to see the actual review and/or weights.

5 Primary reviewers are able to track the progress of their feedback requests by checking the status of the request (Pending, In Progress, Finished, Canceled). However, detailed feedback will only be available for requests that have been marked "Finished."

An example of the review process is as follows:

10

1. The manager starts a review for an employee in Performance Appraiser.
2. From the Review Tabs, the manager clicks on the Multi-Rater Options tab.

15

3. The manager selects users to give feedback information and defines the type and specifics of the request.

4. This initiates an email notification to the users he has requested feedback from.

5. The manager then may or may not actually work on the review but it gets saved as Status = In Progress.

20

6. Users who have email and have been requested to give feedback receive an email message providing information about the request, such as: who it is from; who the feedback is for; when it is due; etc. Users who do not have email will be notified when they open Performance Appraiser, Performance Manager, or Reminders.

25

7. Users who have been requested to give feedback will select items from their "action list" in Performance Appraiser. Once they have completed giving feedback, they mark it "Finished". When a feedback request is marked "Finished," it is available to the manager.

30

8. The manager opens the review that he previously started and accesses the feedback either from the element rating dialog, the goal rating dialog (for specific elements and goals), or from a read-only document on the desktop that contains the consolidated feedback for all items.

35

9. Once the manager has reviewed and incorporated the feedback into his review, he marks it "Complete". The manager can then repeat the notification process to let others see (read-only) the completed review either with or without a request for feedback.

The Descriptions Now Direct module is a software tool that helps the user write an American Disabilities Act (ADA)-compliant professional job description in just a

few minutes. It is extremely easy to use and done completely on-line with the user's Web Browser. First, users select a job from the invention's extensive Job Library of over 3,700 job titles.

- 5 The Job Library contains pre-written Job Summaries and pre-defined Duties & Responsibilities sections. The program prompts the user to answer some relevant questions addressing the job's Supervisory Responsibilities, Qualification Requirements, Physical Demands, and Work Environment. The program then constructs the text based on the answers provided. Once finished, the completed
10 document is sent to the user in one of several format options: HTML, RTF, or plain text, for further editing, if necessary.

The user can search a job library of over 3,700 job titles that is regularly updated as new titles and positions are created in the real world. Once the user completes
15 the Q&A process, he is offered several options for receiving his results. The user can choose from: HTML format for posting on his Intranet; RTF format for editing in any word processor; or a straight text file.

Descriptions Now Direct has been designed to allow the user to navigate in two
20 ways:

1. The user can allow the program to guide him through writing his job description in a "wizard" like manner. After answering the questions in each section, the user simply clicks on "Next" to move to the next section of the
25 job description. This method walks the user through each of the sections and provides the most comprehensive approach to writing an ADA-compliant job description. The user can rework a section at any time by simply clicking the back button and he will find that all of his work has been saved.
30
2. The user can jump directly to the sections that apply to his particular needs. If he is sure of the areas of the job description that need to be addressed, he simply clicks on the menu item on the left and he will be taken directly to that section. To rework a section, the user simply clicks on
35 the menu item that he wants to rework and he is taken directly to that section to find that all of his work was saved.

The user navigates using the method that is most comfortable for him or uses a combination of the two methods once he becomes familiar with the program.

Either way, Help, Advise and Examples are always available simply by clicking the appropriate button on the menu. When the user uses one of these functions, a small window will open on top of his main browser with the text inside.

- 5 Referring to Figs. 12 and 13, The user accesses the content server 1203 through his Intranet or Internet connection 1202 by using his Web browser 1201 and the supplied URL or custom desktop icon for his company.

10 The user's company information and type of service is determined using the endpoint URL 1204. The user is presented with the appropriate login page 1206 where he enters his ID and password or name and email password 1209. The search page is then accessed by the user which allows searching of the online job library 1210.

15 Company information is entered by the user 1213. He then customizes the supervisory responsibilities 1214, qualification requirements 1217, physical demands 1301, and work environment 1304 sections of the job description form. Text is automatically generated for the user's selections and the user is given the option of previewing the final job description before downloading it to his
20 computer 1307.

The user selects the format and delivery options for the final copy of the job description 1309. The document is then assembled on the fly 1310 and delivered to the user 1311.

25

Some of the features available in the Descriptions Now Direct module are:

- Go from a blank page to an ADA-compliant, professional job description in minutes. It is easy and done completely online with the user's Web
30 browser.
- Choose from one of the thousands of built-in job descriptions, answer some relevant questions and let Descriptions Now Direct write sections on Supervisory Responsibilities, Qualifications, Physical Demands and Work
35 Environment.
- The final review document can be received by direct download or email delivery in rich text (.doc) text only or HTML format.

- Unique URL (Web site address) for secure, password protected access
- Corporate branding throughout the site
- 5 • Password-protected system administrator area features:
 - Password administration

Allows the system administrator to look up and change user ID's and passwords by entering the user's name.
 - 10 • Company Information Screen

Allows the system administrator to enter the default company information that will populate user account set up screens and be displayed at the top of the performance review document.
 - 15 • Self-serve user sign up area:

Allows users to create password-protected accounts for access from anywhere. By entering their own name, user ID, and password, users can set up secure access to the online applications.

20

Feature	Benefit
Internet delivery	Instant access anytime, anywhere.
Runs on our server	Always the current version. Nothing to download or install. No IS involvement in roll out.
30 Accessed by any HTML-capable Web Browser	Cross-platform compatible - will run on any OS (Mac, PC, Unix). Fast, interactive and intuitive application.
Wizard format	Easy to use - no steep learning curve.
35 Administration Area	Look up user passwords, create forms and maintain default company information.

Self-serve user sign up area

Easy account set up with no IS
Involvement.

Monthly updates to the online
Job Library

Access to the most current job titles
available.

An example of a Performance Now manual for a system administrator including examples of Web pages that a user encounters when creating a performance review follows:

1.0 Administration Area

The administration area has been designed to provide centralized control over the following functions:

- User ID and password maintenance
- Creation of new user accounts
- Creation and maintenance of performance review forms
- Adding and assignment of employees
- Entry and maintenance of default company information

The Administration Area access URL (Web page address) is provided to the designated system administrator via email from the provider. This URL is password-protected and intended to be accessed by the system administrator only. The administration password is provided by the provider and will be included in the email that the administrator receives designating his administration area.

The administrator needs to create at least one performance review form and should establish an account ID and password to ensure proper functionality of the site. Prior to releasing the self-serve URL (Web page address) used by the customer's managers for account creation and access

Entering the administration area

Referring to Fig. 14, the administrator enters the URL in his Web browser (or clicks on the hot link in his email message) and is prompted for his administration password 1402. The administrator enters his password in the space provided 1403 and clicks "Continue" 1404.

Once the administrator gains access to his administration area, he will see three options from which to choose:

User Info/Password Maintenance

Form Maintenance

5 Company Information

1.1 User Info/Password Maintenance

10 This area allows the administrator to look up users' IDs and passwords, or create new user accounts.

Look up a user's ID/Password

With respect to Figs. 15 and 16, the administrator can search by name 1502 (first and last) or user ID 1503 when searching for a user's lost or forgotten password.
15 The administrator enters the user's name 1502 or ID 1503 and presses the "Look Up" button 1504. User information will be displayed in the user information screen 1601.

Add a New User

20 Referring to Figs. 15 and 17, to add a user, select "Create New User" 1505 from the password lookup screen 1501. Enter the appropriate information and click the "Save Info" button 1706. The account is created and the user can then access the site using the assigned ID and Password.

25 1.2 Form Designer

Before individual managers can begin writing performance reviews at least one performance review form must be created. An electronic performance review form is simply a subset of competencies (from the available 32) grouped to address a particular function or classification of employee.

30

Form Designer also allows the system administrator to customize the language, rating options and other sections of the review form.

35 With respect to Fig. 18, upon entering Form Designer the administrator will be prompted to "Create a New Form" 1803 or "Change an Existing Form" 1802.

Create a New Form

Form Designer has been set up to walk the user through the process of creating his online forms.

Step 1: Enter a name for the new form

Referring to Fig. 19, this is the name of the form that appears on the list of form choices presented to the company's managers prior to writing a performance review.

The user gives the form a name 1902 that includes the company name and describes the nature of the form. For example, ABC Company Technical Form, if the form is intended for use when evaluating technical staff. The user clicks Next 1903 to continue or Prev 1904 to return to the previous screen.

Step 2: Select the competencies to be included

With respect to Fig. 20, the user is presented with a list 2001 of 32 available competencies. The user simply clicks the box next 2002 to a competency name 2003 to add it to the form (a checkmark will appear in the box indicating the competency has been selected).

To deselect a competency, simply click on the checkmark 2002 (the checkmark will disappear indicating the competency is no longer included). Click Next 2006 to continue or Prev 2007 to return to the previous screen.

To see a list of the associated factors to be rated for a given competency, click on the green arrow 2004 next to the competency name. A pop-up window will display the associated factors.

If the user is not sure which competencies to include, he can click on the Get Advice button 2005 for expert advice on selecting competencies.

Step 3: Rename the competencies

Names are assigned to each competency. However, if another name better suites the user's organization, he can change the name. For example, Job Knowledge may be called Product Knowledge in another organization.

Referring to Fig. 21, clicking on the arrow to the right of the competency name 2102 will produce a pull-down menu with alternate competency names. The user selects an alternate name from the menu which is used on

the performance review form. Clicking Next 2103 continues or Prev 2104 returns to the previous screen.

Step 4: Customize the rating options

5 With respect to Fig. 22, Form Designer 2201 allows the administrator to customize the rating text used on the review form as well as choose to include/exclude rating descriptions and the rating numeric.

10 To change the rating text, the user clicks the arrow to the right 2202 of the default text 2203. A drop-down menu will appear with alternate rating text suggestions. Clicking on the alternate name applies the change.

15 The user then answers yes 2206, 2208 or no 2207, 2209 to the options to include the rating descriptions 2204 and/or include the numerical ratings 2205. Clicking Next 2210 continues or Prev 2211 returns to the previous screen.

20 Even if the user chooses not to display the text or numerical rating on the final review form, the text and numerical rating will display when he previews his form online.

If the user is unsure about the value of the choices made on this screen he can click on the Get Advice button 2212 for expert advice on rating options.

25 Step 5: Preview your results

Referring to Fig. 23, by clicking the "Click here to preview" link 2302 the user views the blank performance review form that includes the competencies and options selected. Clicking Next 2303 returns to the main administration page or Prev 2304 returns to the previous screen.

30 Change an Existing Form

With respect to Fig. 18, to change an existing review form (add/remove competencies or change rating options) click the "Change an Existing Form" button 1802 after entering Form Designer from the main administration page.

35 Step 1: Select the form to modify

With respect to Fig. 24, upon entering the form maintenance area 2401 the user is presented with a pull-down menu of his existing forms.

Clicking the arrow 2403 to the right of the form name 2402 produces a drop-down list of the current forms. The user selects the form to modify and clicks Next 2404 to continue, or Prev 2405 to return to the Form Designer main screen.

5

Step 2: Add/Remove competencies

The user is presented with the same competency selection screen used to design the original form. Competencies currently included have a checkmark next to them. Competencies are added by clicking in the white box next to the competency name. Existing competencies are removed by clicking on the check mark. Clicking on the green arrow next to the competency name to shows a pop-up list of the factors to be rated for each competency. Clicking Next continues and Prev returns to the form selection screen.

10

15

Steps 3 - 5

Refer to steps 3 through 5 under Create a New Form for detailed instructions.

20

1.3 Company Information

Referring to Fig. 25, the company info screen 2501 allows the user to enter the default company information 2502 that appears in the header of the completed performance review document. This information populates all online forms as managers set up their access accounts. It can be overridden by any individual user when writing a performance review.

25

The company information is entered in the blanks provided 2502 and the "Save Information" button 2503 is pressed when complete. The user can update this information any time.

30

2.0 Self-serve user account creation

The administrator is given a second URL (Web page address) when he receives his administration area URL and password. This URL is where the managers in the administrator's organization will access PerformanceReview.com.

35

The administrator needs to distribute this URL after he creates at least one performance review form in the administration area.

The administrator can alert hundreds of managers (users) that the site is ready for access by creating a single email message that is sent to a distribution list made up of all of the managers authorized to use the site. The email includes the access URL, using the full Web address, in the body of the message so users will be instantly connected by clicking on the link that the administrator provides.

2.1 Accessing PerformanceReview.com to write a performance review

Each manager needs to set up a password-protected account prior to writing performance reviews once they have been notified that PerformanceReview.com is available.

With respect to Fig. 26, the administrator's access page will look similar to the example 2601. It will have the company's logo and corporate branding and, depending on which online software is purchased, links for the company's managers to write job descriptions 2602, performance reviews 2603, or both.

2.2 New user account setup

Each manager sets up a password-protected access account prior to writing his or her first performance review. Referring to Fig. 27, users are taken to the account setup screen 2701 by clicking on the "New User Account Setup" from the main access page.

Managers fill out the form supplying their own User ID 2702 and Password 2703 and then click "Submit Information" 2704.

With respect to Fig. 28, if the manager is successful, he receives the success message screen 2801.

Referring to Fig. 29, if the number of users authorized under the terms of the company's license agreement is exceeded, a user trying to set up an account will receive the warning screen 2901.

2.3 Writing a performance review

With respect to Fig. 30, once the manager has established his or her ID and password, clicking the link from the main access page, "Click Here to Write a Performance Review", takes him to the application log in page 3001.

Users will enter their User ID 3002 and Password 3003 each time they access the site to begin writing a performance review.

Selecting a form

Referring to Fig. 31, the list of forms the administrator created are presented to the manager 3101. Clicking the form name 3102 will produce a pop-up box that displays the competencies and related factors for each form.

Managers can also build their own, single-use forms, from the list of 32 available competencies 3103. However, these forms will not be saved for future review writing sessions.

General overview

Once the appropriate form has been selected, the manager is taken through a step-by-step process to complete the review document. The following is a general overview of that process:

Enter employee information

PerformanceReview.com requires only a name and gender identification to write the performance review. Optional information addressing salary, review period, exemption status and more can entered but is not necessary.

Rating the competencies

With respect to Fig. 32, the competencies 3201 the administrator selected for inclusion on the chosen form are presented to the manager for evaluation. Each competency is made up of between four and six performance factors 3202 that are rated on a one to five scale. The manager assesses these factors and text is automatically generated 3203 based on his input.

PerformanceReview.com has been designed to walk the manager through evaluating each competency before addressing subsequent sections of the review. However, the manager can navigate to any section of the review, or jump to any competency with the available hot links on the screen 3204.

Entering goals

Referring to Figs. 32 and 33, each time a manager selects a review form to begin the process of writing the review he or she will be presented with the

option to include a section to address goals 3205. If selected, the goals screen 3301 is presented during the review writing process.

5 If a manager rates a goal 3302, the goal rating will be incorporated into the overall rating calculation for the review. If N/A 3303 is selected, the goal rating will not be factored into the overall rating for the employee.

Creating the review summary

10 With respect to Fig. 34, PerformanceReview.com calculates an overall rating for the employee 342 once all of the competencies and goals have been rated. The manager is presented with three summary statements 3405 from which to choose based on that calculation. These statements 3405 correlate with the overall rating and are provided as a starting point for the manager to build upon.

15

Plans for Improvement

Referring to Fig. 35, the manager is presented with a list 3502 containing each competency 3503 and its associated rating 3504. Managers can choose to include plans for improvement 3505, if necessary. The rating 20 3504 is displayed to help managers choose which competencies may need to be addressed. However, plans for improvement suggestions are offered to help improve areas needing attention and build on existing strengths.

25 With respect to Fig. 36, once the manager has selected the competencies for which he would like to get improvement ideas, the Plans for Improvement Selection screen 3601 is presented.

30 In the same manner as rating the competencies, the manager is taken step-by-step through each of the competencies chosen 3602 and presented with applicable ideas for improvement 3603.

Final Preview

35 Before accepting the final version of the review document, the manager has an opportunity to rework any section of the review, as needed. Referring to Fig. 37, the final preview screen 3701 is designed to allow the manager to make the following changes before the review document is downloaded:

- Add/Remove competencies from the review 3702

- Add/Remove numeric rating from the review 3703
- Add/Remove rating descriptions from the review 3704
- Add/Change employee information 3705
- Change rating level descriptions 3706
- 5 • Re-rate any competency 3707
- Re-rate/re-enter goals 3708
- Recreate the review summary 3709
- Add/Remove plans for improvement 3710

- 10 The final preview screen 3701 also gives the manager an opportunity to view the completed review form online 3711 before final acceptance.

Downloading the results

- 15 PerformanceReview.com delivers the final review document in one of three formats (rich text format, HTML or plain text), via direct FTP download or email attachment.

Referring to Fig. 38, managers use the email function 3806 to distribute copies of the review document.

- 20 Direct download 3805 of an RTF document 3804 opens the final review in the user's word processor upon execution.

- 25 The manager is given the option to write another review or return to the main entry screen once the final review has been received. The session is marked as complete at that point. The review document does not reside on the content server and the manager has the only copy. The review document file is located on the manager's PC in a directory designated during the download process.

- 30 Although the invention is described herein with reference to the preferred embodiment, one skilled in the art will readily appreciate that other applications, such as creating employee handbooks, may be substituted for those set forth herein without departing from the spirit and scope of the present invention. Accordingly, the invention should only be limited by the Claims included below.

CLAIMS

- 5 1. A process for documenting and detailing employee performance and job descriptions across a computer network, such as the Internet, in a computer environment, comprising the steps of:
- validating user IDs and passwords through a content server;
- providing an administration area resident on said server;
- 10 wherein said administration area allows a customer's system administrator to create corporate information for corporate branding on the screens presented to said customer's users;
- wherein said administration area allows said administrator to create and maintain said customer's user account information; and
- 15 wherein said administration area allows said administrator to create and maintain said customer's performance review and/or job description forms.
2. The process of claim 1, wherein said administration area is accessed by said administrator through a Universal Resource Locator (URL).
- 20 3. The process of claim 1, wherein user access to said server is metered through pay-per-use or a limited-time subscription.
4. The process of claim 1, wherein said content server is a Web server.
- 25 5. The process of claim 1, further comprising the steps of:
- providing a performance review module resident on said server; and
- wherein a user accesses said performance review module through a URL.
- 30 6. The process of claim 5, wherein data selected or entered by a user is written into an online database and are not associated with any individual and wherein said data is assembled into readable format when said user executes the command to deliver the final document.
- 35 7. The process of claim 5, wherein the user is walked through writing a performance review in a step-by-step process with expert advice offered at every step of said process.

8. The process of claim 5, wherein the user is given the choice to start a new review for a new or existing employee or to continue a previous review, if one exists.

5 9. The process of claim 5, wherein the user selects each competency element and/or goal and rates it and wherein text descriptions are created automatically for each rating.

10 10. The process of claim 9, wherein the ratings for said competency elements and said goals are totaled and wherein summary statement text choices are created and presented to the user for selection.

15 11. The process of claim 9, wherein the user selects which competency elements or goals require plans for improvement/coaching ideas and wherein said plans for improvement/coaching ideas are selected by said user.

20 12. The process of claim 9, wherein summary statements for the review are automatically created based on the overall rating of the employee and are selectable by said user.

13. The process of claim 5, wherein non-anonymous feedback from other users is gathered.

25 14. The process of claim 1, further comprising the steps of:
providing a job description module resident on said server; and
wherein a user accesses said job description module through a Universal Resource Locator (URL).

30 15. The process of claim 14, wherein the user searches the online job library through the job search page and wherein said job library contains pre-written Job Summaries and pre-defined Duties & Responsibilities sections.

35 16. The process of claim 14, wherein text is automatically created for sections of the job description form based on the user's responses to relevant questions.

17. The process of claim 14, wherein the user is guided through writing a job description in a wizard-like manner and/or can jump directly to the sections that apply to said user's particular needs.

18. The process of claim 14, wherein Help, Advise and Examples are always available to the user by clicking the appropriate button on a menu.

5 19. The process of claims 5 or 14, wherein the final document is assembled on the fly and previewed by the user or delivered to said user by direct download or email delivery in Rich Text Format (RTF), text only, or Hypertext Markup Language (HTML) format.

10 20. The process of claims 5 or 14, wherein a cookie is used to establish a user as a unique visitor and to track said user's activities during an open session and wherein said session is kept open until said user receives his or her completed document.

15 21. The process of claims 5 or 14, wherein data selected or entered by a user are written into an online database and are not associated with any individual and wherein said data are assembled into readable format when said user executes the command to deliver the final document.

20 22. A process for documenting and detailing employee performance across the Internet in a computer environment, comprising the steps of:
validating user IDs and passwords through a Web server;
providing a performance review module resident on said server; and
wherein a user accesses said performance review module through a Universal Resource Locator (URL).

25 23. The process of claim 22, wherein data selected or entered by a user is written into an online database and are not associated with any individual and wherein said data is assembled into readable format when said user executes the command to deliver the final document.

30 24. The process of claim 22, wherein the user is walked through writing a performance review in a step-by-step process with expert advice offered at every step of said process.

35 25. The process of claim 22, wherein the user is given the choice to start a new review for a new or existing employee or to continue a previous review, if one exists.

26. The process of claim 22, wherein the user selects each competency element and/or goal and rates it and wherein text descriptions are created automatically for each rating.

5 27. The process of claim 26, wherein the ratings for said competency elements and said goals are totaled and wherein summary statement text choices are created and presented to the user for selection.

10 28. The process of claim 26, wherein the user selects which competency elements or goals require plans for improvement/coaching ideas and wherein said plans for improvement/coaching ideas are selected by said user.

15 29. The process of claim 26, wherein summary statements for the review are automatically created based on the overall rating of the employee and are selectable by said user.

30. The process of claim 22, wherein non-anonymous feedback from other users is gathered.

20 31. The process of claim 22, wherein the final performance review document is assembled on the fly and previewed by the user or delivered to said user by direct download or email delivery in Rich Text Format (RTF), text only, or Hypertext Markup Language (HTML) format.

25 32. The process of claim 22, wherein a cookie is used to establish a user as a unique visitor and to track said user's activities during an open session and wherein said session is kept open until said user receives his or her completed document.

30 33. The process of claim 22, wherein data selected or entered by a user are written into an online database and are not associated with any individual and wherein said data are assembled into readable format when said user executes the command to deliver the final performance review document.

35 34. The process of claim 22, wherein user access to said server is metered through pay-per-use or a limited-time subscription.

35. The process of claim 22, further comprising the steps of:
providing an administration area resident on said server;

wherein said administration area allows a customer's system administrator to create corporate information for corporate branding on the screens presented to said customer's users;

5 wherein said administration area allows said administrator to create and maintain said customer's user account information; and

wherein said administration area allows said administrator to create and maintain said customer's performance review forms.

10 36. The process of claim 35, wherein said administration area is accessed by said administrator through a Universal Resource Locator (URL).

37. A process for creating and detailing job descriptions across the Internet in a computer environment, comprising the steps of:

15 validating user IDs and passwords through a Web server;
providing a job description module resident on said server; and
wherein a user accesses said job description module through a Universal Resource Locator (URL).

20 38. The process of claim 37, wherein data selected or entered by a user is written into an online database and are not associated with any individual and wherein said data is assembled into readable format when said user executes the command to deliver the final document.

25 39. The process of claim 37, wherein the user searches the online job library through the job search page and wherein said job library contains pre-written Job Summaries and pre-defined Duties & Responsibilities sections.

30 40. The process of claim 37, wherein text is automatically created for sections of the job description form based on the user's responses to relevant questions.

35 41. The process of claim 37, wherein the user is guided through writing a job description in a wizard-like manner and/or can jump directly to the sections that apply to said user's particular needs.

42. The process of claim 37, wherein Help, Advise and Examples are always available to the user by clicking the appropriate button on a menu.

43. The process of claim 37, wherein the final job description document is assembled on the fly and previewed by the user or delivered to said user by direct download or email delivery in Rich Text Format (RTF), text only, or Hypertext Markup Language (HTML) format.

5

44. The process of claim 37, wherein a cookie is used to establish a user as a unique visitor and to track said user's activities during an open session and wherein said session is kept open until said user receives his or her completed document.

10

45. The process of claim 37, wherein data selected or entered by a user are written into an online database and are not associated with any individual and wherein said data are assembled into readable format when said user executes the command to deliver the final document.

15

46. The process of claim 37, wherein user access to said server is metered through pay-per-use or a limited-time subscription.

47. The process of claim 37, further comprising the steps of:

providing an administration area resident on said server;

20

wherein said administration area allows a customer's system administrator to create corporate information for corporate branding on the screens presented to said customer's users;

wherein said administration area allows said administrator to create and maintain said customer's user account information; and

25

wherein said administration area allows said administrator to create and maintain said customer's job description forms.

48. The process of claim 47, wherein said administration area is accessed by said administrator through a Universal Resource Locator (URL).

30

49. An apparatus for documenting and detailing employee performance and job descriptions across a computer network, such as the Internet, in a computer environment, comprising:

a module for validating user IDs and passwords through a content server;

35

an administration area resident on said server;

wherein said administration area allows a customer's system administrator to create corporate information for corporate branding on the screens presented to said customer's users;

wherein said administration area allows said administrator to create and maintain said customer's user account information; and

wherein said administration area allows said administrator to create and maintain said customer's performance review and/or job description forms.

5

50. The apparatus of claim 49, wherein said administration area is accessed by said administrator through a Universal Resource Locator (URL).

10

51. The apparatus of claim 49, wherein user access to said server is metered through pay-per-use or a limited-time subscription.

52. The apparatus of claim 49, wherein said content server is a Web server.

15

53. The apparatus of claim 49, further comprising:
a performance review module resident on said server; and
wherein a user accesses said performance review module through a URL.

20

54. The apparatus of claim 53, wherein data selected or entered by a user is written into an online database and are not associated with any individual and wherein said data is assembled into readable format when said user executes the command to deliver the final document.

25

55. The apparatus of claim 53, wherein the user is walked through writing a performance review in a step-by-step process with expert advice offered at every step of said process.

30

56. The apparatus of claim 53, wherein the user is given the choice to start a new review for a new or existing employee or to continue a previous review, if one exists.

57. The apparatus of claim 53, wherein the user selects each competency element and/or goal and rates it and wherein text descriptions are created automatically for each rating.

35

58. The apparatus of claim 57, wherein the ratings for said competency elements and said goals are totaled and wherein summary statement text choices are created and presented to the user for selection.

59. The apparatus of claim 57, wherein the user selects which competency elements or goals require plans for improvement/coaching ideas and wherein said plans for improvement/coaching ideas are selected by said user.

5 60. The apparatus of claim 57, wherein summary statements for the review are automatically created based on the overall rating of the employee and are selectable by said user.

10 61. The apparatus of claim 53, wherein non-anonymous feedback from other users is gathered.

62. The apparatus of claim 49, further comprising:
a job description module resident on said server; and
wherein a user accesses said job description module through a Universal
15 Resource Locator (URL).

63. The apparatus of claim 62, wherein the user searches the online job library through the job search page and wherein said job library contains pre-written Job Summaries and pre-defined Duties & Responsibilities sections.
20

64. The apparatus of claim 62, wherein text is automatically created for sections of the job description form based on the user's responses to relevant questions.

25 65. The apparatus of claim 62, wherein the user is guided through writing a job description in a wizard-like manner and/or can jump directly to the sections that apply to said user's particular needs.

30 66. The apparatus of claim 62, wherein Help, Advise and Examples are always available to the user by clicking the appropriate button on a menu.

67. The apparatus of claims 53 or 62, wherein the final document is assembled on the fly and previewed by the user or delivered to said user by direct download or email delivery in Rich Text Format (RTF), text only, or Hypertext Markup Language (HTML) format.
35

68. The apparatus of claims 53 or 62, wherein a cookie is used to establish a user as a unique visitor and to track said user's activities during an open session and wherein said session is kept open until said user receives his or her completed document.

69. The apparatus of claims 53 or 62, wherein data selected or entered by a user are written into an online database and are not associated with any individual and wherein said data are assembled into readable format when said user
5 executes the command to deliver the final document.

70. A apparatus for documenting and detailing employee performance across the Internet in a computer environment, comprising:
a module for validating user IDs and passwords through a Web server;
10 a performance review module resident on said server; and
wherein a user accesses said performance review module through a Universal Resource Locator (URL).

71. The apparatus of claim 70, wherein data selected or entered by a user is
15 written into an online database and are not associated with any individual and wherein said data is assembled into readable format when said user executes the command to deliver the final document.

72. The apparatus of claim 70, wherein the user is walked through writing a
20 performance review in a step-by-step process with expert advice offered at every step of said process.

73. The apparatus of claim 70, wherein the user is given the choice to start a new review for a new or existing employee or to continue a previous review, if
25 one exists.

74. The apparatus of claim 70, wherein the user selects each competency element and/or goal and rates it and wherein text descriptions are created automatically for each rating.
30

75. The apparatus of claim 74, wherein the ratings for said competency elements and said goals are totaled and wherein summary statement text choices are created and presented to the user for selection.

35 76. The apparatus of claim 74, wherein the user selects which competency elements or goals require plans for improvement/coaching ideas and wherein said plans for improvement/coaching ideas are selected by said user.

77. The apparatus of claim 74, wherein summary statements for the review are automatically created based on the overall rating of the employee and are selectable by said user.

5 78. The apparatus of claim 70, wherein non-anonymous feedback from other users is gathered.

79. The apparatus of claim 70, wherein the final performance review document is assembled on the fly and previewed by the user or delivered to said user by
10 direct download or email delivery in Rich Text Format (RTF), text only, or Hypertext Markup Language (HTML) format.

80. The apparatus of claim 70, wherein a cookie is used to establish a user as a unique visitor and to track said user's activities during an open session and wherein
15 said session is kept open until said user receives his or her completed document.

81. The apparatus of claim 70, wherein data selected or entered by a user are written into an online database and are not associated with any individual and wherein said data are assembled into readable format when said user executes
20 the command to deliver the final performance review document.

82. The apparatus of claim 70, wherein user access to said server is metered through pay-per-use or a limited-time subscription.

25 83. The apparatus of claim 70, further comprising:
an administration area resident on said server;
wherein said administration area allows a customer's system administrator to create corporate information for corporate branding on the screens presented to said customer's users;
30 wherein said administration area allows said administrator to create and maintain said customer's user account information; and
wherein said administration area allows said administrator to create and maintain said customer's performance review forms.

35 84. The apparatus of claim 83, wherein said administration area is accessed by said administrator through a Universal Resource Locator (URL).

85. A apparatus for creating and detailing job descriptions across the Internet in a computer environment, comprising:

a module for validating user IDs and passwords through a Web server;
a job description module resident on said server; and
wherein a user accesses said job description module through a Universal
Resource Locator (URL).

5

86. The apparatus of claim 85, wherein data selected or entered by a user is written into an online database and are not associated with any individual and wherein said data is assembled into readable format when said user executes the command to deliver the final document.

10

87. The apparatus of claim 85, wherein the user searches the online job library through the job search page and wherein said job library contains pre-written Job Summaries and pre-defined Duties & Responsibilities sections.

15

88. The apparatus of claim 85, wherein text is automatically created for sections of the job description form based on the user's responses to relevant questions.

20

89. The apparatus of claim 85, wherein the user is guided through writing a job description in a wizard-like manner and/or can jump directly to the sections that apply to said user's particular needs.

90. The apparatus of claim 85, wherein Help, Advise and Examples are always available to the user by clicking the appropriate button on a menu.

25

91. The apparatus of claim 85, wherein the final job description document is assembled on the fly and previewed by the user or delivered to said user by direct download or email delivery in Rich Text Format (RTF), text only, or Hypertext Markup Language (HTML) format.

30

92. The apparatus of claim 85, wherein a cookie is used to establish a user as a unique visitor and to track said user's activities during an open session and wherein said session is kept open until said user receives his or her completed document.

35

93. The apparatus of claim 85, wherein data selected or entered by a user are written into an online database and are not associated with any individual and wherein said data are assembled into readable format when said user executes the command to deliver the final document.

94. The apparatus of claim 85, wherein user access to said server is metered through pay-per-use or a limited-time subscription;

95. The apparatus of claim 85, further comprising:

an administration area resident on said server;

wherein said administration area allows a customer's system administrator to create corporate information for corporate branding on the screens presented to said customer's users;

wherein said administration area allows said administrator to create and maintain said customer's user account information; and

wherein said administration area allows said administrator to create and maintain said customer's job description forms.

96. The apparatus of claim 95, wherein said administration area is accessed by said administrator through a Universal Resource Locator (URL).

97. A program storage medium readable by a computer, tangibly embodying a program of instructions executable by the computer to perform method steps for documenting and detailing employee performance and job descriptions across a computer network, such as the Internet, in a computer environment, comprising the steps of:

validating user IDs and passwords through a content server;

providing an administration area resident on said server;

wherein said administration area allows a customer's system administrator to create corporate information for corporate branding on the screens presented to said customer's users;

wherein said administration area allows said administrator to create and maintain said customer's user account information; and

wherein said administration area allows said administrator to create and maintain said customer's performance review and/or job description forms.

98. The method of claim 97, wherein said administration area is accessed by said administrator through a Universal Resource Locator (URL).

99. The method of claim 97, wherein user access to said server is metered through pay-per-use or a limited-time subscription.

100. The method of claim 97, wherein said content server is a Web server.

101. The method of claim 97, further comprising the steps of:
providing a performance review module resident on said server; and
wherein a user accesses said performance review module through a URL.

5 102. The method of claim 101, wherein data selected or entered by a user is written into an online database and are not associated with any individual and wherein said data is assembled into readable format when said user executes the command to deliver the final document.

10 103. The method of claim 101, wherein the user is walked through writing a performance review in a step-by-step process with expert advice offered at every step of said process.

15 104. The method of claim 101, wherein the user is given the choice to start a new review for a new or existing employee or to continue a previous review, if one exists.

20 105. The method of claim 101, wherein the user selects each competency element and/or goal and rates it and wherein text descriptions are created automatically for each rating.

25 106. The method of claim 105, wherein the ratings for said competency elements and said goals are totaled and wherein summary statement text choices are created and presented to the user for selection.

107. The method of claim 105, wherein the user selects which competency elements or goals require plans for improvement/coaching ideas and wherein said plans for improvement/coaching ideas are selected by said user.

30 108. The method of claim 105, wherein summary statements for the review are automatically created based on the overall rating of the employee and are selectable by said user.

35 109. The method of claim 101, wherein non-anonymous feedback from other users is gathered.

110. The method of claim 97, further comprising the steps of:
providing a job description module resident on said server; and

wherein a user accesses said job description module through a Universal Resource Locator (URL).

5 111. The method of claim 110, wherein the user searches the online job library through the job search page and wherein said job library contains pre-written Job Summaries and pre-defined Duties & Responsibilities sections.

10 112. The method of claim 110, wherein text is automatically created for sections of the job description form based on the user's responses to relevant questions.

113. The method of claim 110, wherein the user is guided through writing a job description in a wizard-like manner and/or can jump directly to the sections that apply to said user's particular needs.

15 114. The method of claim 110, wherein Help, Advise and Examples are always available to the user by clicking the appropriate button on a menu.

20 115. The method of claims 101 or 110, wherein the final document is assembled on the fly and previewed by the user or delivered to said user by direct download or email delivery in Rich Text Format (RTF), text only, or Hypertext Markup Language (HTML) format.

25 116. The method of claims 101 or 110, wherein a cookie is used to establish a user as a unique visitor and to track said user's activities during an open session and wherein said session is kept open until said user receives his or her completed document.

30 117. The method of claims 101 or 110, wherein data selected or entered by a user are written into an online database and are not associated with any individual and wherein said data are assembled into readable format when said user executes the command to deliver the final document.

35 118. A program storage medium readable by a computer, tangibly embodying a program of instructions executable by the computer to perform method steps for documenting and detailing employee performance across the Internet in a computer environment, comprising the steps of:

validating user IDs and passwords through a Web server;

providing a performance review module resident on said server; and

wherein a user accesses said performance review module through a Universal Resource Locator (URL).

5 119. The method of claim 118, wherein data selected or entered by a user is written into an online database and are not associated with any individual and wherein said data is assembled into readable format when said user executes the command to deliver the final document.

10 120. The method of claim 118, wherein the user is walked through writing a performance review in a step-by-step process with expert advice offered at every step of said process.

15 121. The method of claim 118, wherein the user is given the choice to start a new review for a new or existing employee or to continue a previous review, if one exists.

20 122. The method of claim 118, wherein the user selects each competency element and/or goal and rates it and wherein text descriptions are created automatically for each rating.

123. The method of claim 122, wherein the ratings for said competency elements and said goals are totaled and wherein summary statement text choices are created and presented to the user for selection.

25 124. The method of claim 122, wherein the user selects which competency elements or goals require plans for improvement/coaching ideas and wherein said plans for improvement/coaching ideas are selected by said user.

30 125. The method of claim 122, wherein summary statements for the review are automatically created based on the overall rating of the employee and are selectable by said user.

35 126. The method of claim 118, wherein non-anonymous feedback from other users is gathered.

127. The method of claim 118, wherein the final performance review document is assembled on the fly and previewed by the user or delivered to said user by direct download or email delivery in Rich Text Format (RTF), text only, or Hypertext Markup Language (HTML) format.

128. The method of claim 118, wherein a cookie is used to establish a user as a unique visitor and to track said user's activities during an open session and wherein said session is kept open until said user receives his or her completed document.

129. The method of claim 118, wherein data selected or entered by a user are written into an online database and are not associated with any individual and wherein said data are assembled into readable format when said user executes the command to deliver the final performance review document.

130. The method of claim 118, wherein user access to said server is metered through pay-per-use or a limited-time subscription.

131. The method of claim 118, further comprising the steps of:

providing an administration area resident on said server;

wherein said administration area allows a customer's system administrator to create corporate information for corporate branding on the screens presented to said customer's users;

wherein said administration area allows said administrator to create and maintain said customer's user account information; and

wherein said administration area allows said administrator to create and maintain said customer's performance review forms.

132. The method of claim 131, wherein said administration area is accessed by said administrator through a Universal Resource Locator (URL).

133. A program storage medium readable by a computer, tangibly embodying a program of instructions executable by the computer to perform method steps for creating and detailing job descriptions across the Internet in a computer environment, comprising the steps of:

validating user IDs and passwords through a Web server;

providing a job description module resident on said server; and

wherein a user accesses said job description module through a Universal Resource Locator (URL).

134. The method of claim 133, wherein data selected or entered by a user is written into an online database and are not associated with any individual and wherein said data is assembled into readable format when said user executes the command to deliver the final document.

135. The method of claim 133, wherein the user searches the online job library through the job search page and wherein said job library contains pre-written Job Summaries and pre-defined Duties & Responsibilities sections.

5

136. The method of claim 133, wherein text is automatically created for sections of the job description form based on the user's responses to relevant questions.

137. The method of claim 133, wherein the user is guided through writing a job description in a wizard-like manner and/or can jump directly to the sections that apply to said user's particular needs.

10

138. The method of claim 133, wherein Help, Advise and Examples are always available to the user by clicking the appropriate button on a menu.

15

139. The method of claim 133, wherein the final job description document is assembled on the fly and previewed by the user or delivered to said user by direct download or email delivery in Rich Text Format (RTF), text only, or Hypertext Markup Language (HTML) format.

20

140. The method of claim 133, wherein a cookie is used to establish a user as a unique visitor and to track said user's activities during an open session and wherein said session is kept open until said user receives his or her completed document.

25

141. The method of claim 133, wherein data selected or entered by a user are written into an online database and are not associated with any individual and wherein said data are assembled into readable format when said user executes the command to deliver the final document.

30

142. The method of claim 133, wherein user access to said server is metered through pay-per-use or a limited-time subscription.

143. The method of claim 133, further comprising the steps of:

providing an administration area resident on said server;

wherein said administration area allows a customer's system administrator to create corporate information for corporate branding on the screens presented to said customer's users;

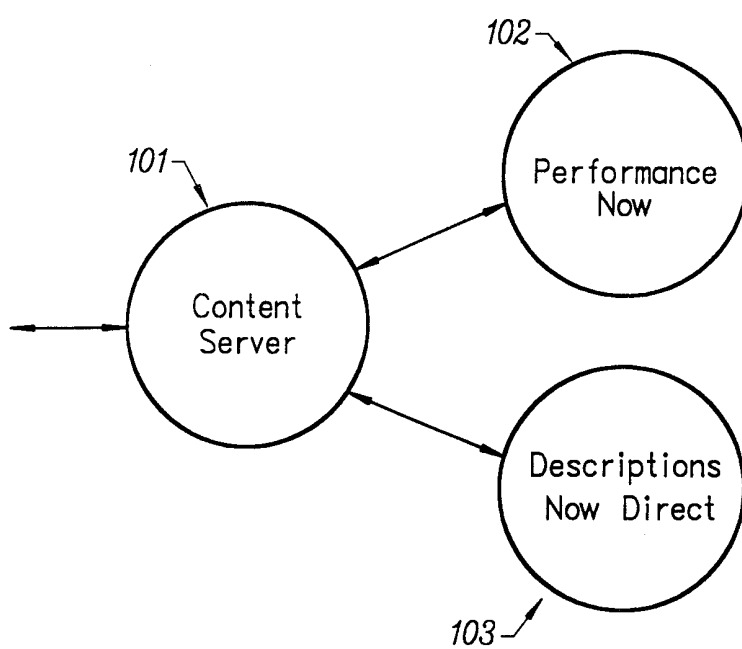
35

wherein said administration area allows said administrator to create and maintain said customer's user account information; and

wherein said administration area allows said administrator to create and maintain said customer's job description forms.

144. The method of claim 47, wherein said administration area is accessed by
5 said
administrator through a Universal Resource Locator (URL).

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*FIG. 1*

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Level	Avg. Range	Default Rating	Alternate Names
5	4.75-5.00	Outstanding	Always ← 204 Commendable ← 205 Consistently Superior ← 206 Distinguished Excellent Excels Exceptional Extremely Effective Far Exceeds Expectations Far Exceeds Job Requirements Far exceeds requirements Greatly exceeds standards Outstanding performance Superior Unusually effective
4	3.75-4.74	Exceeds job requirements	Above average Better than most Commendable Consistently exceeds expectations Consistently exceeds requirements Exceeds Exceeds expectations Exceeds requirements Exceeds standards Excellent Excels Highly effective Sometimes superior Usually Very good Very good performance

FIG. 2

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Performance Criteria	Alternate Names	Factors	305
Adaptability	302 Ability to Learn New Skills 303 Flexibility 304 Versatility 301	Adapts to changes in the work environment Manages competing demands Accepts criticism and feedback Changes approach or method to best fit the situation	306
Analytical Skills	Data Analysis Reasoning	Synthesizes complex or diverse information Collects and researches data Uses intuition and experience to complement data Identifies data relationships and dependencies Design work flows and procedures	
Attendance & Punctuality	Attendance Availability	Schedules time off in advance Begins working on time Keeps absences within guidelines Ensures work responsibilities are covered when absent Arrives at meetings and appointments on time	
Communications	Communication Skills Effective Communication Written & Oral Communications	Expresses ideas and thoughts verbally Expresses ideas and thoughts in written form Exhibits good listening and comprehension Keeps others adequately informed Selects and uses appropriate communication methods	
Cooperation	Interpersonal Skills Personal Interactions Teamwork Working Relationships	Establishes and maintains effective relations Exhibits tact and consideration Displays positive outlook and pleasant manner Offers assistance and support to co-workers Works cooperatively in group situations Works actively to resolve conflicts	

FIG. 3

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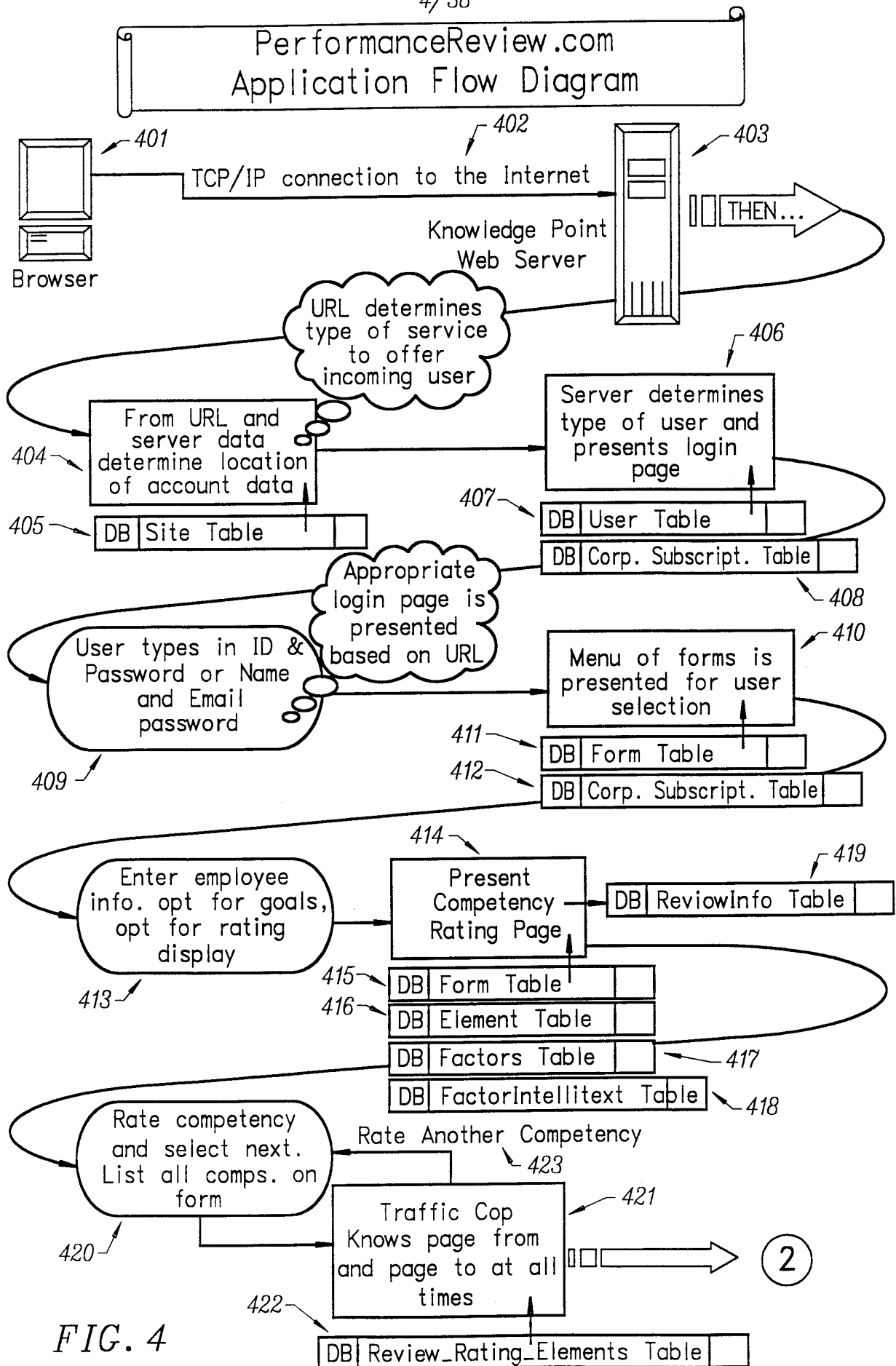


FIG. 4

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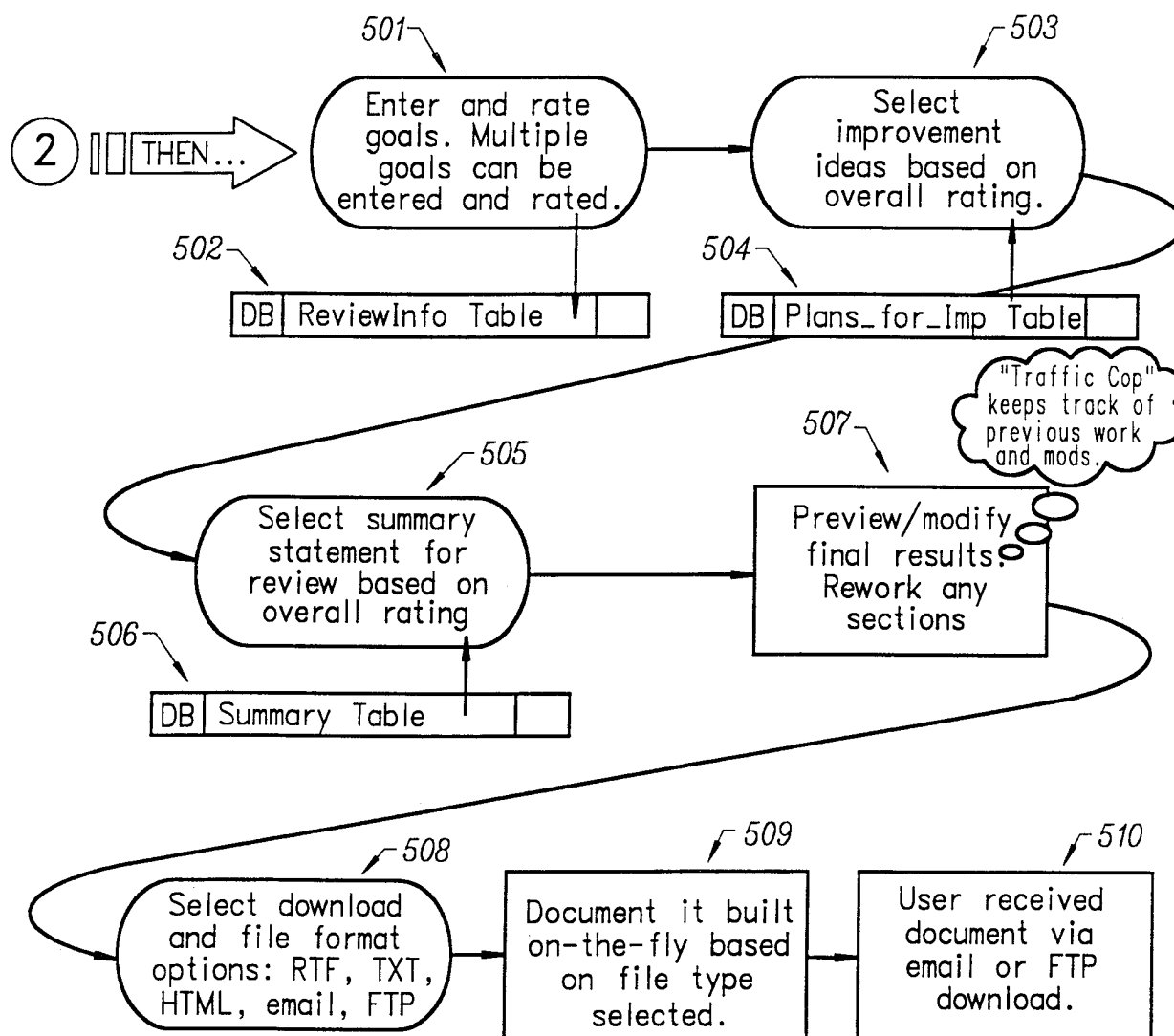


FIG. 5

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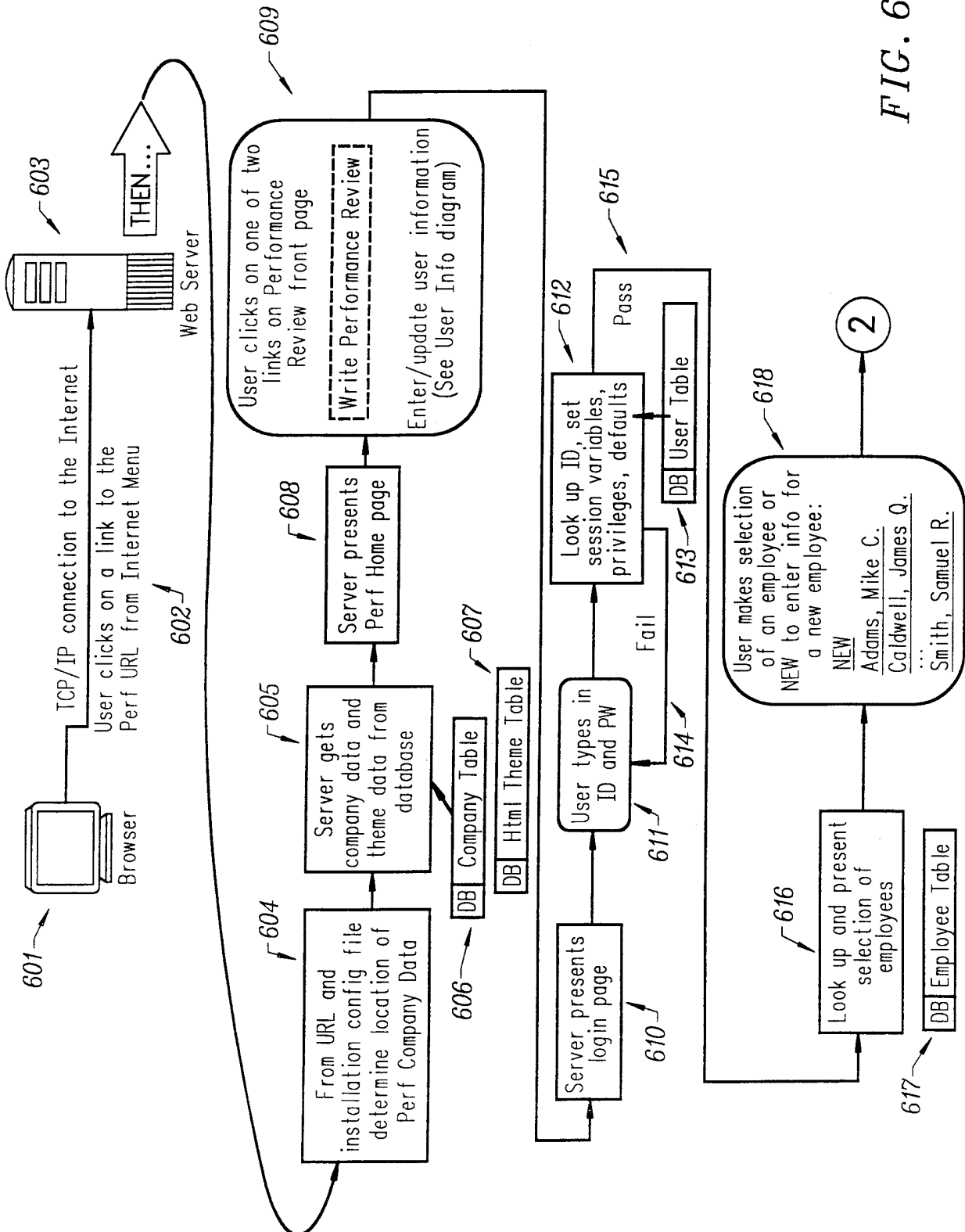
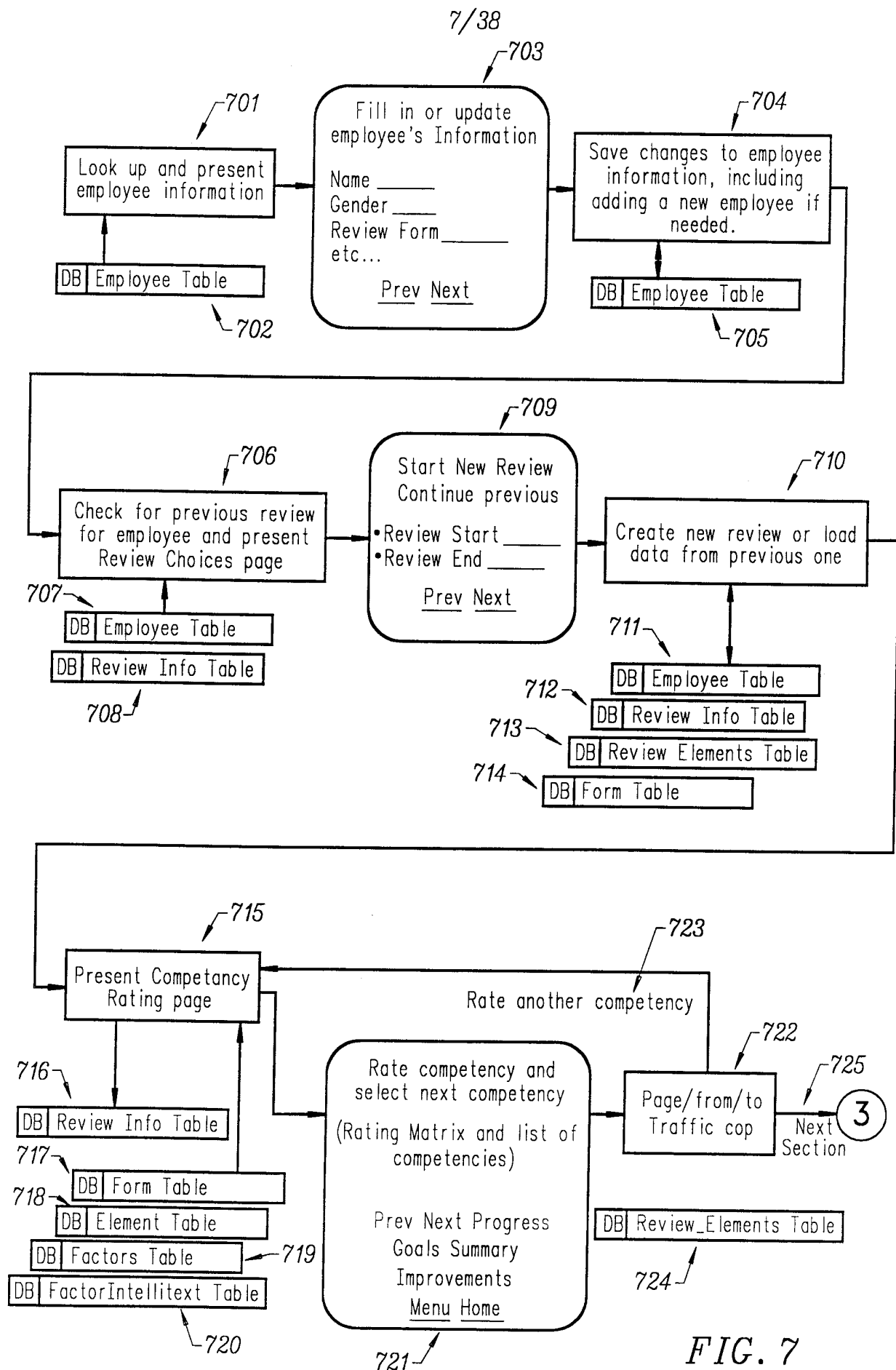


FIG. 6



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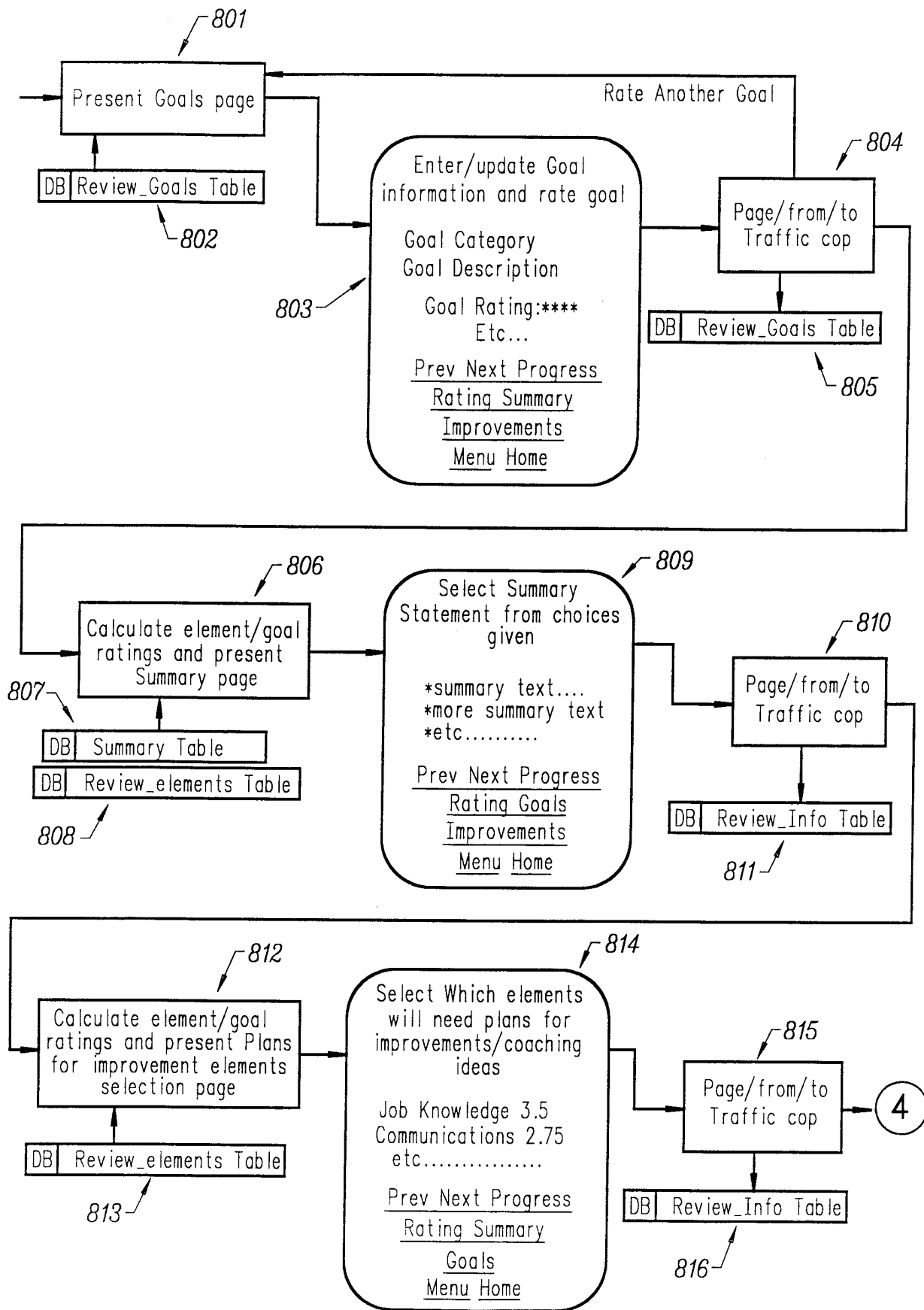


FIG. 8

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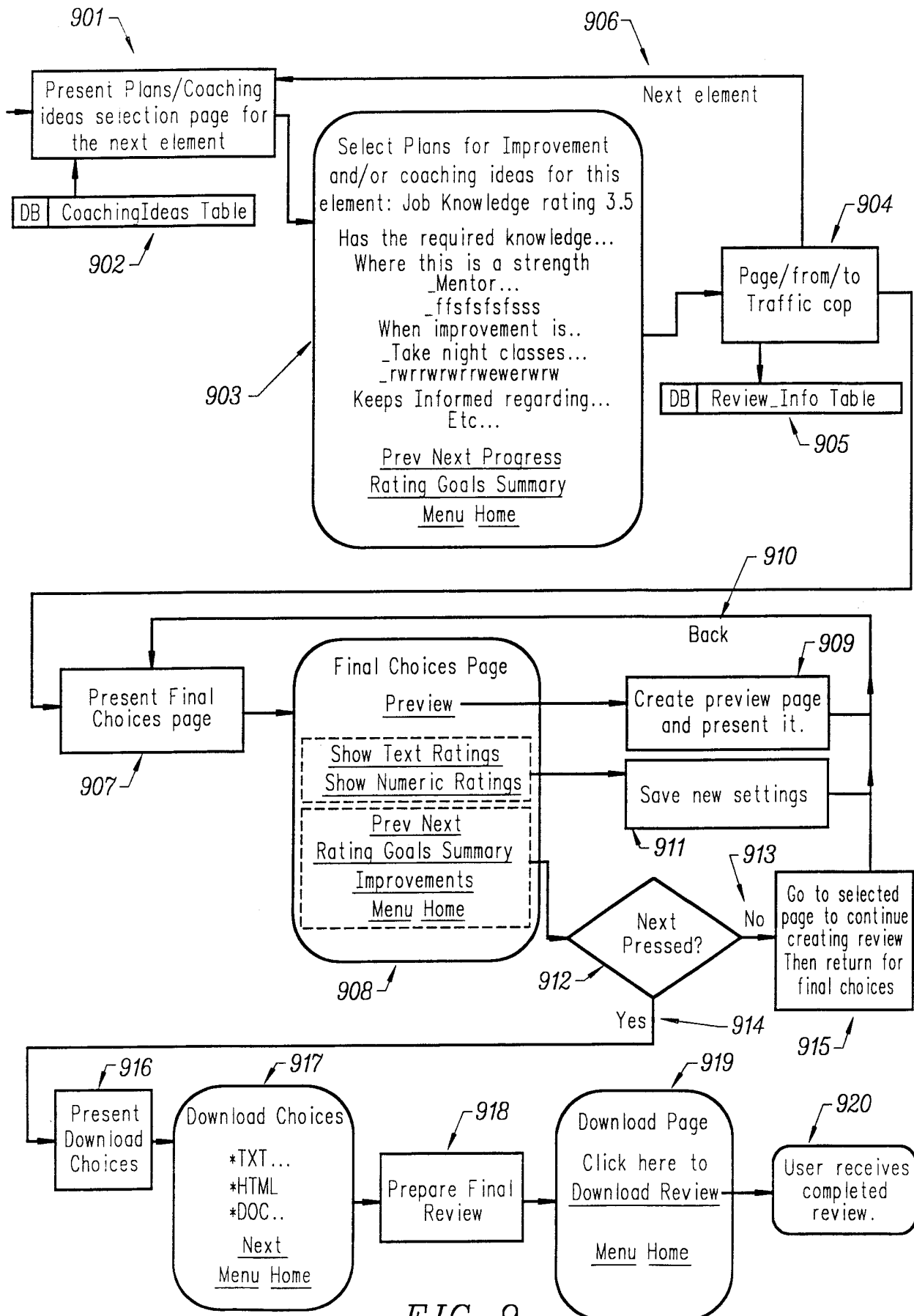


FIG. 9

SUBSTITUTE SHEET (RULE 26)

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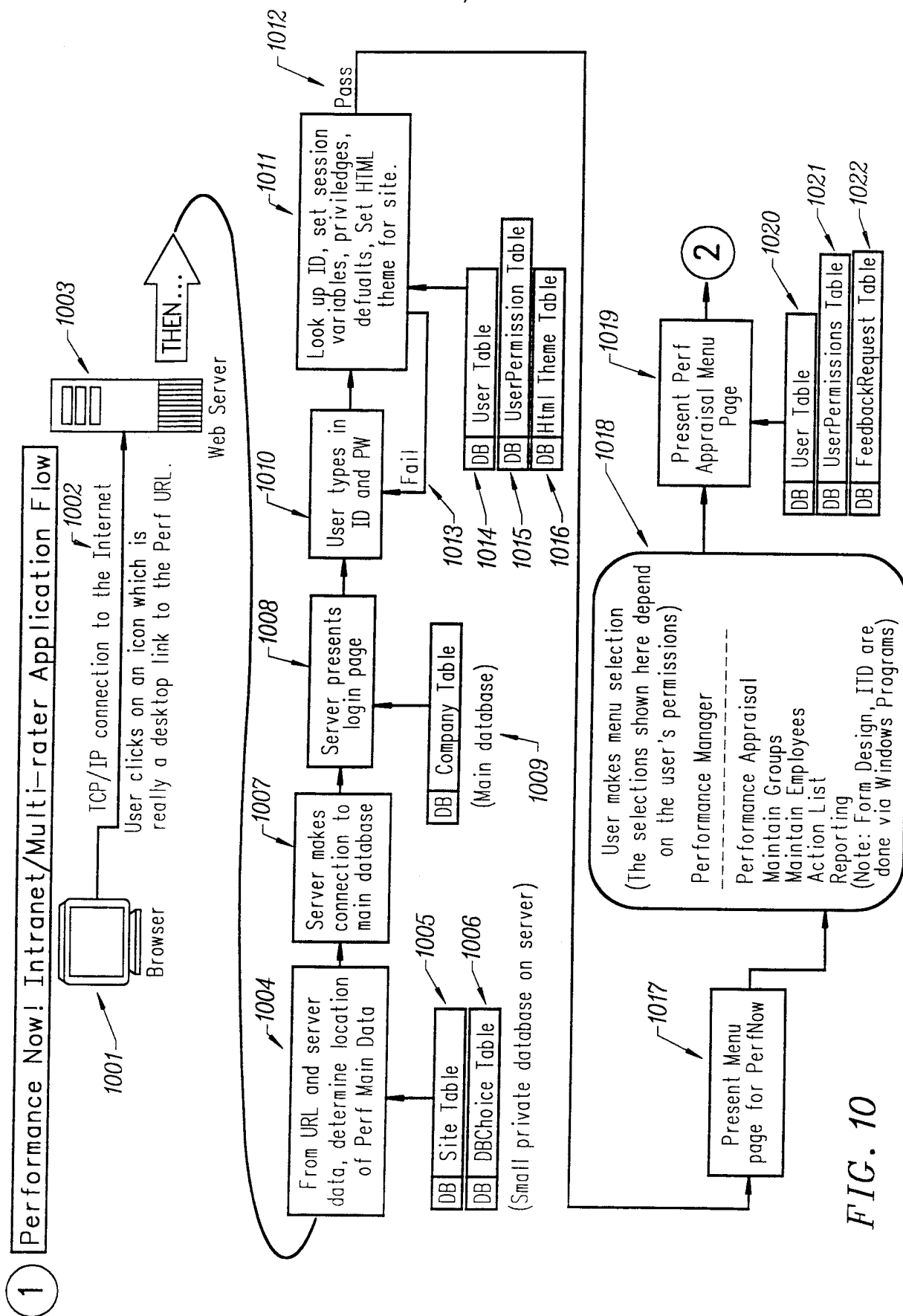


FIG. 10

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2

Performance Appraisal Process

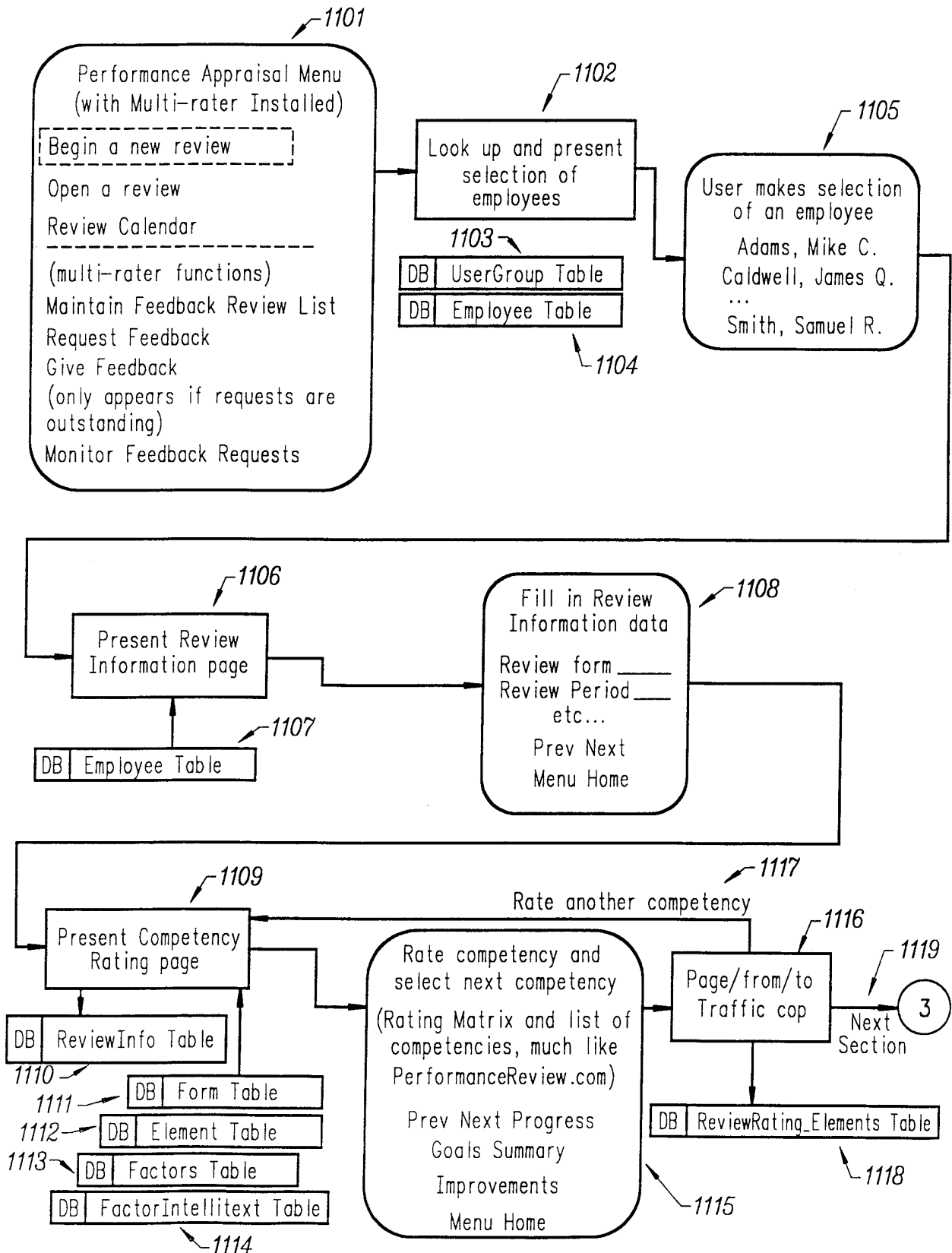


FIG. 11

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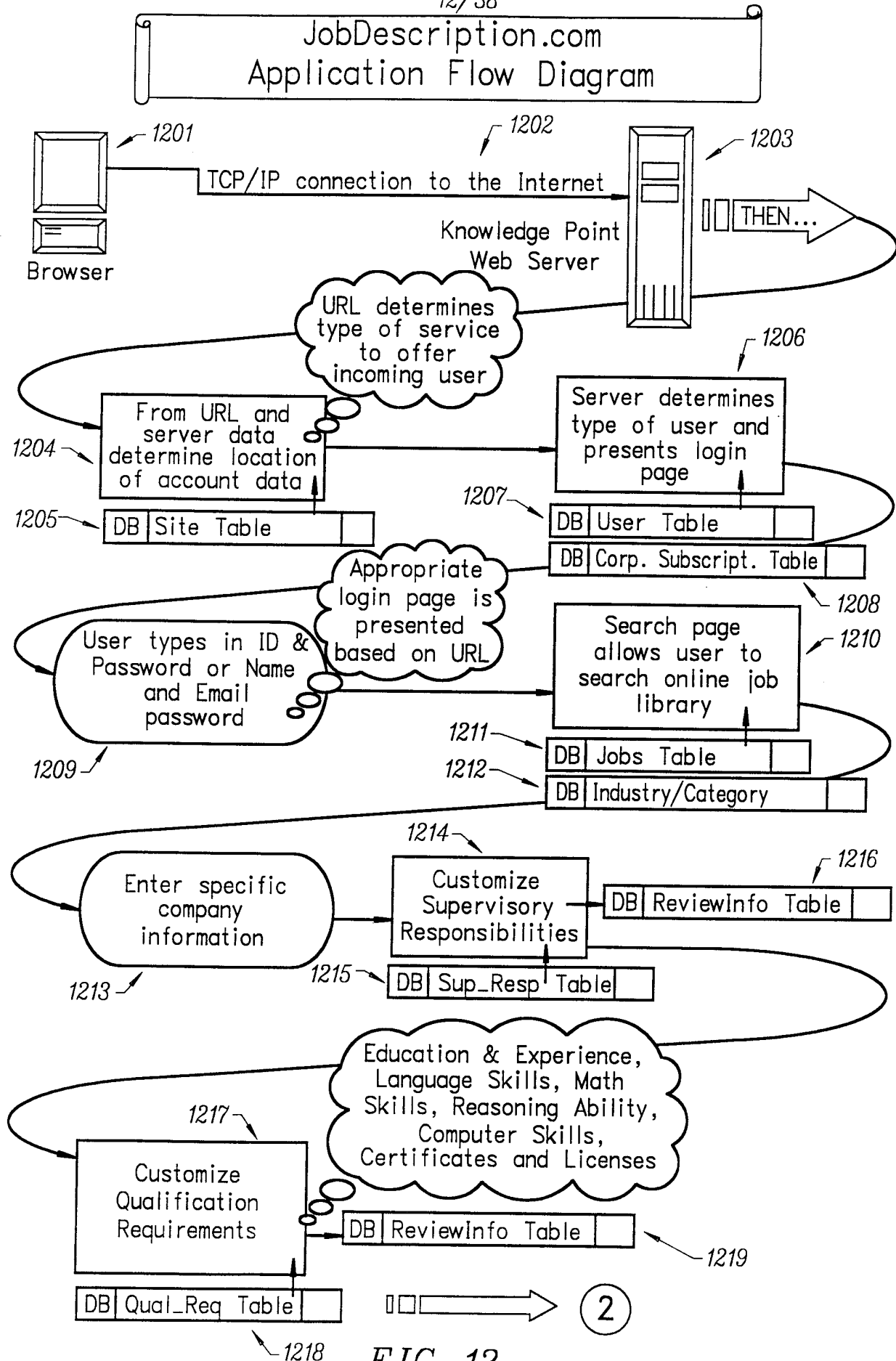


FIG. 12

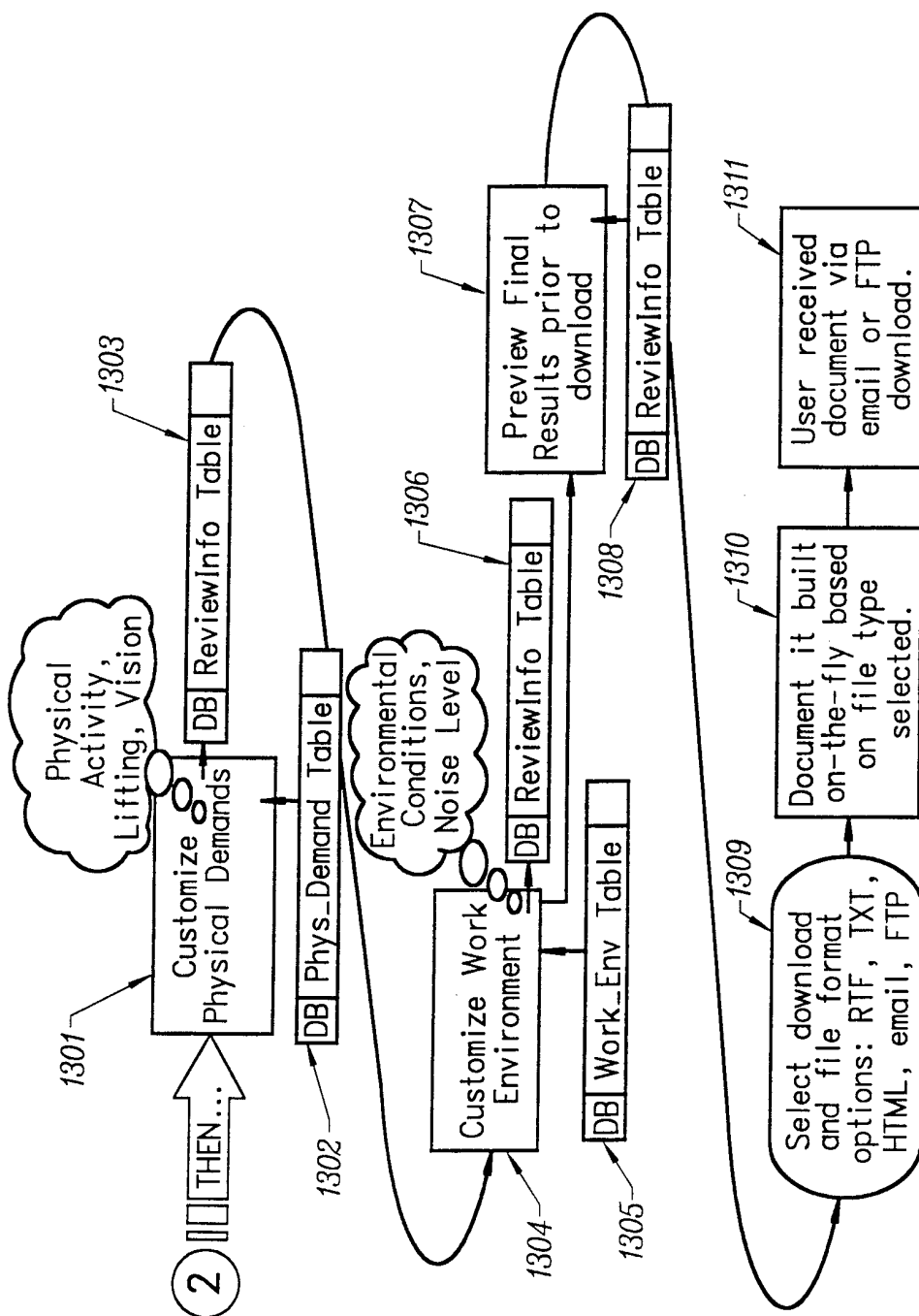


FIG. 13

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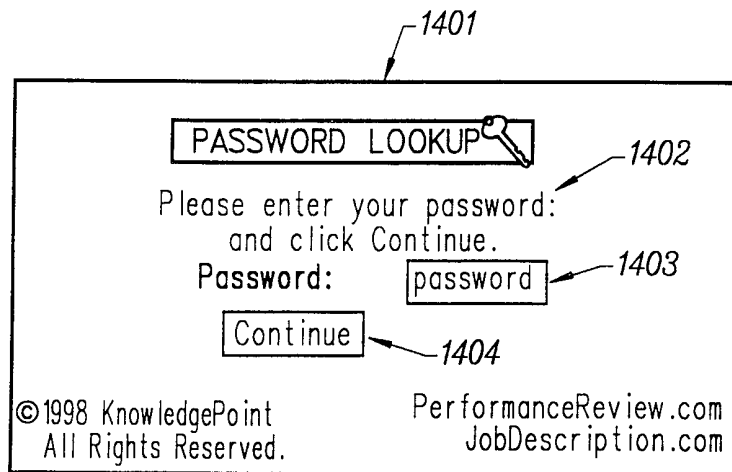



FIG. 14

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1501

PASSWORD LOOKUP 

Enter the name or User ID of the person who's
user info you need to look up.

Or you can click the "Create New User" button
to enter information for a new user.

First Name:

Michael

1502

Last Name:

George

1502

User ID:

1503

1505

Create New User

Look Up

1504


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FIG. 15

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1601

PASSWORD LOOKUP 

Here is the user information you requested.

First Name:	Michael	}	1602
Last Name:	George		
User ID:	mgeorge		1603
Password:	beeber		1604

Make any changes above and then select "Save Info"

To continue without making changes, select "No Change" and you will be returned to the main Administration Page.

Save Info

No Change


1606

1605

FIG. 16

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1701

PASSWORD LOOKUP 

Here is the user information you requested.

First Name:	<input type="text" value="John"/>	}	1702
Last Name:	<input type="text" value="Smith"/>		
User ID:	<input type="text" value="jsmith"/>		1703
Password:	<input type="text" value="happy1"/>		1704

Make any changes above and then select "Save Info"

To continue without making changes, select "No Change" and you will be returned to the main Administration Page.

Save Info

No Change


1706

1705

FIG. 17


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1801

FORM DESIGNER 

The Form Design wizard will assist you in creating
forms to use with PerformanceReview.com

Begin by selecting one of the options below

1803

Create a New Form

1802

Change an Existing Form


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FIG. 18

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1901 ↗

FORM DESIGNER 

Create a new form for use with PerformanceReview.com

Enter the name you wish to assign to this form.
This name will appear on the form selection menu for your users.

1902 ↗

1904 ↗◀ prev next ▶1903 ↗

Important: Use your company name in the form name.
(i.e. ABC Company Management Form)


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FIG. 19

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2001

FORM DESIGNER 

2003 Select the competencies you want to include on this form
2002 Click on the green arrow to view the list of associated factors.

2004

▶ <input checked="" type="checkbox"/> Job Knowledge	▶ <input type="checkbox"/> Planning & Organization	▶ <input checked="" type="checkbox"/> Written Communications
▶ <input checked="" type="checkbox"/> Quantity	▶ <input type="checkbox"/> Attendance & Punctuality	▶ <input type="checkbox"/> Oral Communications
▶ <input checked="" type="checkbox"/> Quality	▶ <input type="checkbox"/> Safety & Security	▶ <input type="checkbox"/> Analytical Skills
▶ <input type="checkbox"/> Communications	▶ <input checked="" type="checkbox"/> Cost Consciousness	▶ <input type="checkbox"/> Organization Support
▶ <input type="checkbox"/> Dependability	▶ <input type="checkbox"/> Managing People	▶ <input type="checkbox"/> Business Ethics
▶ <input checked="" type="checkbox"/> Cooperation	▶ <input type="checkbox"/> Project Management	▶ <input checked="" type="checkbox"/> Performance Coaching
▶ <input type="checkbox"/> Innovation	▶ <input type="checkbox"/> Customer Service	▶ <input type="checkbox"/> Conflict Resolution
▶ <input type="checkbox"/> Initiative	▶ <input type="checkbox"/> Sales Skills	▶ <input checked="" type="checkbox"/> Diversity Commitment
▶ <input type="checkbox"/> Problem Solving	▶ <input type="checkbox"/> Personal Appearance	▶ <input type="checkbox"/> Recruitment & Staffing
▶ <input type="checkbox"/> Judgment	▶ <input checked="" type="checkbox"/> Leadership	▶ <input type="checkbox"/> Delegation
▶ <input checked="" type="checkbox"/> Adaptability	▶ <input type="checkbox"/> Teamwork	

2005 Get Advice

Tip: Use the TAB key to move between competencies and use your spacebar to select

2006 ◀prev next▶

2007


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FIG. 20

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2101

FORM DESIGNER 

You can assign alternate names for the competencies you've selected.
To rename a competency select an alternate name from the pull-down menu.

Job Knowledge

▼

Quantity

▼

Quality

▼

Cooperation

▼

Adaptability

▼

Cost Consciousness

▼

Leadership

▼

Written Communications

▼

Performance Coaching

▼

Diversity Commitment

▼

2104
◀ prev next ▶
2103

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FIG. 21

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2201

FORM DESIGNER

PerformanceReview.com will generate text based on your evaluation of each of the Performance Factors that make up the Competencies you have selected.

You will evaluate these factors on a 1 to 5 scale.

What do you want to call the five rating levels?

You can use the ones below or change them.

Rating Level	Rating Text
Rating 5	2203 Always 2202
Rating 4	Above average
Rating 3	Acceptable
Rating 2	Below average
Rating 1	Consistently unsatisfactory

2204 Do you want the above rating descriptions to appear on your final review form? ☒ YES ☐ NO

2205 Do you want numerical ratings (from 1.00 to 5.00) to appear on your final review form? ☒ YES ☐ NO

2206

2207

2208

2209

Get Advice

2212

2211

2210


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FIG. 22

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2301 ↗

FORM DESIGNER 

You have completed all the design options for this form.

Clicking NEXT below will place this form on the form selection menu for your users and return you to the main Administration page.

2302 ↗ Click here to preview the form before submitting it for inclusion in PerformanceReview.com

You have created a custom form that contains pre-selected competencies. Your users can create one-off custom forms any time by selecting the "Build Your Own Form" option on the form selection menu page. These one-off forms will not be saved.

◀prev next▶

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2304 ↗ ↘ 2303

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FIG. 23

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2401

FORM DESIGNER 

Select the form you wish to change from the list below.

2402

ABC Company Technical F

▼

2403

On the page that follows a checkmark indicates the competency is included on the current form. De-select the checkmark to remove a competency or select additional competencies as required.

2404◀prev next▶2405


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FIG. 24

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2501

COMPANY INFO 

Enter your company information below.
The information provided will be used as the default for user accounts
and in the header of your performance review documents.

Company Name:

Address:

City, State, Zip:

Country:

Phone:

Fax:

2502

2503

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FIG. 25

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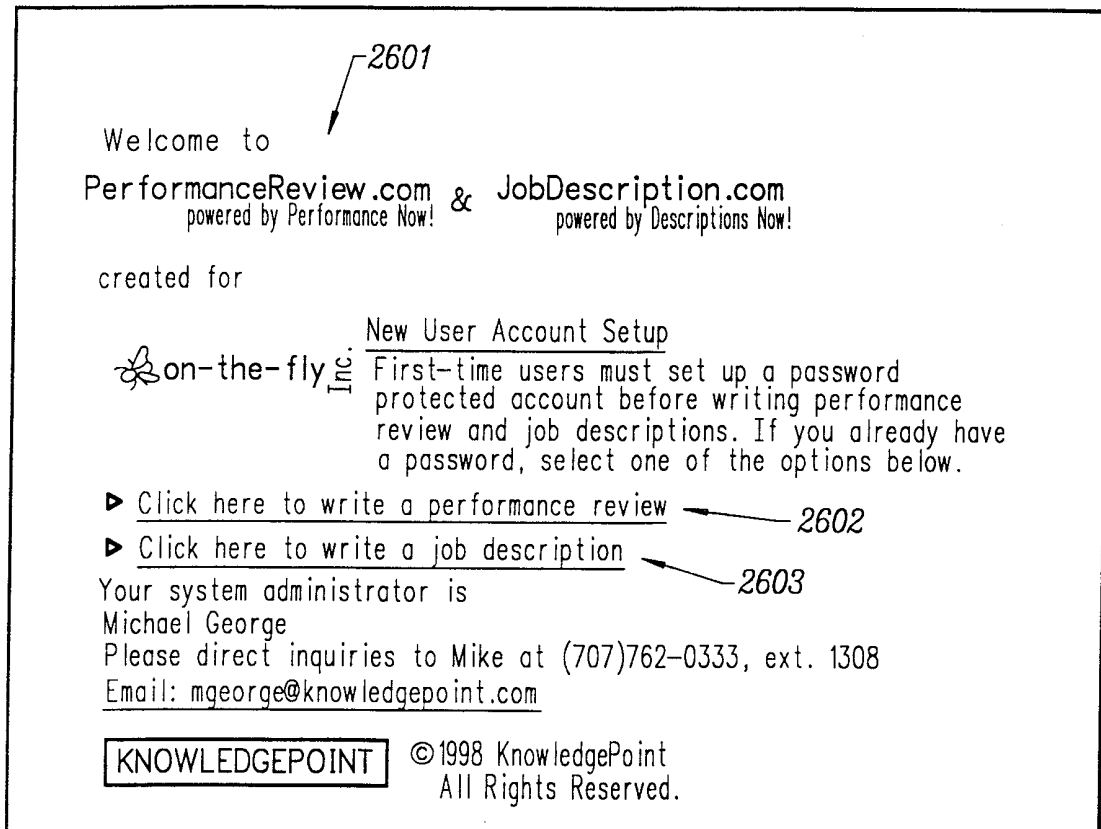



FIG. 26

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2701

ACCOUNT SETUP 

Enter Your Account Information

If you already have an account and cannot remember your password, or need to change your current password, please contact your system administrator.

First Name:

Last Name:

E-mail address:

User ID: 2702

Password: 2703

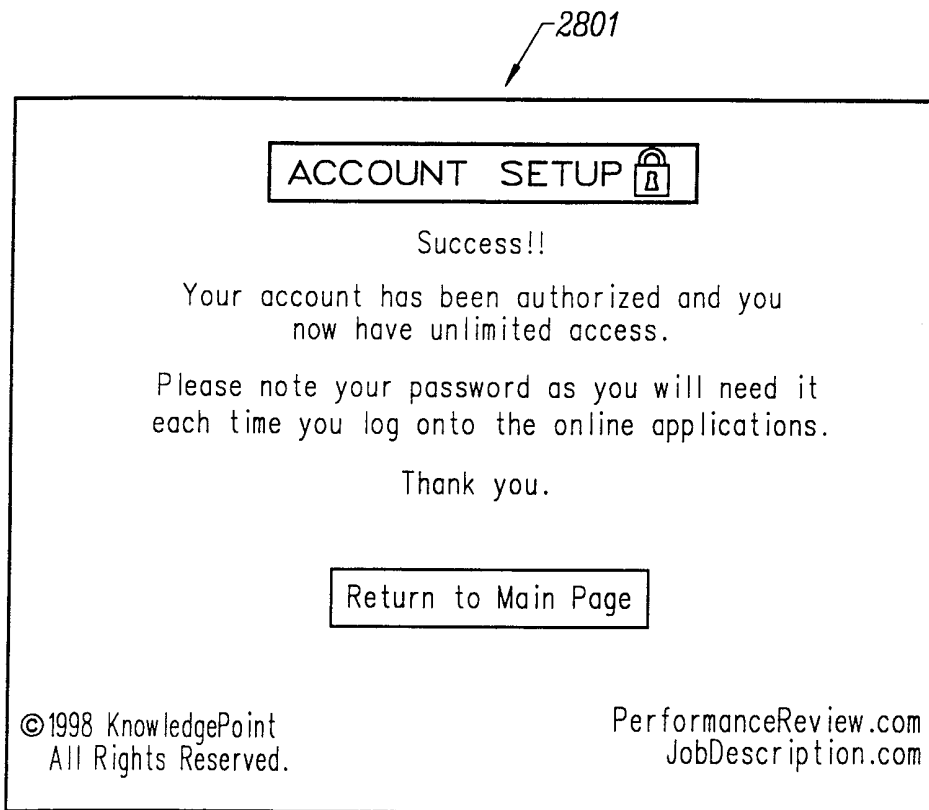
2704

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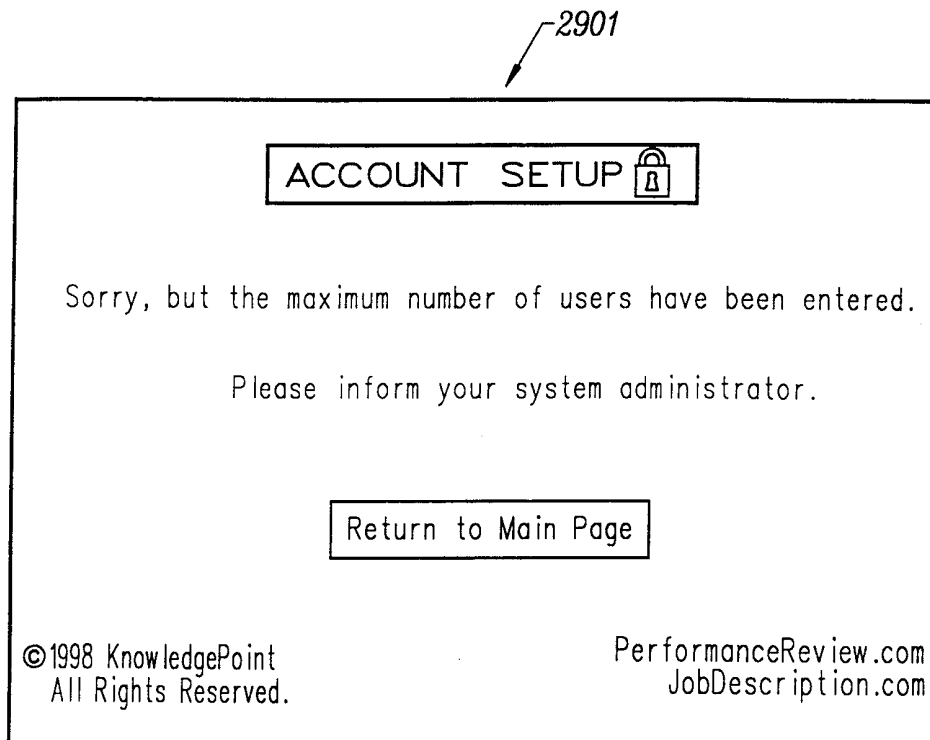
PerformanceReview.com
JobDescription.com

FIG. 27

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*FIG. 28*

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*FIG. 29*

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3001

Account Information

◀prev next▶

Please enter your login information.

3002 → User ID

3003 → Password

Next

PerformanceReview.com
powered by Performance Now!

Detailed description: This is a schematic diagram of a web page for logging into an account. The page is enclosed in a large rectangular frame. At the top, the title 'Account Information' is centered. To the right of the title is a navigation link '◀prev next▶'. Below the title is the instruction 'Please enter your login information.'. This is followed by a login form box. Inside this box, there are two rows: 'User ID' with a text input field, and 'Password' with a password input field. To the left of the form box, there are two labels, '3002' and '3003', with arrows pointing to the 'User ID' and 'Password' fields respectively. Below the form box is a 'Next' button. At the bottom of the page, the text 'PerformanceReview.com' is displayed, with 'powered by Performance Now!' in a smaller font underneath it. A reference numeral '3001' with an arrow points to the main content area of the page.

FIG. 30

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3101

Build Review Form
Select Rating Levels

Get Advice

◀prev next▶

Relevant Performance Competencies have been grouped into suggested "review forms."
Select the form you want to use to evaluate this employee.
Tip: Click on the form name to see details on the competencies.

3102

- ☒ ABC Company Technical Form
- ☐ Clerical
- ☐ Hello McFly!!
- ☐ Management
- ☐ On-the-Fly Manager Form
- ☐ Production
- ☐ Sales and Service
- ☐ Universal
- ☐ Build your own list from 32 available Competencies

3103

In addition to a section for rating competencies, would you also like to enter Goals for the employee?

☒ YES ☐ NO

◀prev next▶

FIG. 31

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Click on any section button to jump directly to that section of the review.

Rating Screen - Overview

3201

Rate the Performance Competencies

Get Advice
3205 View Progress
Start Over

Click to get expert advice

Click to start over any time during the process

Click to go to the next competency or return to the previous one

Rate the Performance Competencies Define and Rate Goals Create the Review Summary Plans for Improvement

Select the rating level for each factor. Text will be generated automatically based on your selections.

Rating matrix used to generate Intelli-text below

3202

Job Knowledge	NA	1	2	3	4	5
Competent in required job skills and knowledge	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Exhibits ability to learn and apply new skills	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Keeps abreast of current developments	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Requires minimal supervision	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Displays understanding of how job relates to others	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Uses resources effectively	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

3204

Click on any competency name to jump directly to that rating screen

Job Knowledge
Quantity
Quality
Cooperation
Adaptability
Cost Consciousness
Leadership
Written Communications
Performance Coaching
Diversity Commitment

Here is where the Intelli-text is created based on the selections above.

It can be modified here, or after the final review is downloaded.

3203

You can modify the text here, or after you download the review.

Steve learns and applies new skills quickly. He demonstrates competency in the skills and knowledge required. He is knowledgeable about current developments in his field. Steve works within the normal scope of supervision, and he displays a good understanding of how his job relates to other jobs. He effectively uses the resources and tools available to him.

FIG. 32

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3304

Click on any section button to jump directly to that section of the review.

Define and Rate Goals

Get Advice
View Progress
Start Over

Rate the Performance Competencies **Define and Rate Goals** Create the Review Summary Plans for Improvement

3305

Due Date

Goal Title (Required)

Category

Goal Description

Goal Management

Goal Result

3306

Rate Another Goal

Click to see the document in progress

Click to start over any time during the process

Click to go to the next competency or return to the previous one

Once completed, click here to add another goal

Enter goal information in the spaces provided

3302

Goal Rating NA 1 2 3 4 5

3303

Use this matrix to rate the goal if desired

3307

Click to go to the next competency or return to the previous one

3308

Click to see the document in progress

3309

Click to start over any time during the process

3310

Click to go to the next competency or return to the previous one

3311

Once completed, click here to add another goal

3312

Enter goal information in the spaces provided

3313

Use this matrix to rate the goal if desired

FIG. 33

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3401

Click to go to the next competency or return to the previous one

Overall rating based on all competencies and goals rated

Example summary statements from which to build upon

Rate the Performance Competencies
Define and Rate Goals
Create the Review Summary
Plans for Improvement

<prev next>

The overall rating for this review, based on the competencies and goals you rated, is shown below.
 Select a sample summary statement to be placed on the review form under the Overall Rating section.
 Note: The examples provided should be used as a starting point to develop a complete review summary once the final review form is downloaded.

Section	Rating	Rating Text
Overall Rating	3.17	Meets requirements
Competencies		
Job Knowledge	3.17	Meets requirements

Select a summary statement:

- ☒ **Continued satisfactory performance**
 The overall level of Steve's performance has not significantly changed since the most recent review. He continues to demonstrate better performance in some areas but meets expectations in all his responsibilities.
- ☐ **Improved to satisfactory rating**
 Steve's performance has significantly improved since the last review. As documented above, his current performance meets job requirements. I am expecting this improved level of performance to continue.
- ☐ **New employee, satisfactory rating**
 Steve has been in this position since May 31, 1997, less than a year. During that time, he has assumed most of the essential duties of the position and ony needs support on some of the more complicated aspects. I am expecting that Steve will have accomplished those functions by the next review.

FIG. 34

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3501

Plans for Improvement

[Get Advice](#)
[View Progress](#)
[Start Over](#)

Rate the Performance Competencies
Define and Rate Goals
Create the Review Summary
Plans for Improvement

[<prev](#)
[next>](#)

The overall rating for this review based on the Competencies and Goals you rated is shown below.

You can now develop plans for improvement on selected Performance Competencies.

Section	Rating	Rating Text	Get Ideas for Improvement
Overall Rating	2.24	Needs Improvement	
Job Knowledge	3.25	Meets requirements	<input type="checkbox"/>
Quantity	1.80	Needs Improvement	<input checked="" type="checkbox"/>
Quality	1.80	Needs Improvement	<input checked="" type="checkbox"/>
Cooperation	1.17	Unsatisfactory	<input checked="" type="checkbox"/>
Cost Consciousness	2.00	Needs Improvement	<input checked="" type="checkbox"/>
Leadership	3.40	Meets requirements	<input type="checkbox"/>

3502
3504

Next

3503

Individual as well as overall rating for the competencies is displayed

Select the competencies for which improvement ideas are needed

3505

FIG. 35

Rate the Performance Competencies Define and Rate Goals Create the Review Summary Plans for Improvement

Click to move to the next or previous competency

3602

List of competencies chosen. Navigate directly by clicking on competency name

3606

Select appropriate statements to be included in the Plans for Improvement section of the review form

36/38

Each Competency has suggestions for coaching the employees to:

- * Improve in areas that need attention
- * Build on existing strength

The development ideas you select will be show in a separate section called Plans for Improvement.

Quantity
Quality
Cooperation
Cost Consciousness

3606

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Ask for help in removing obstacles to increasing quantity.

Be sure you understand the results expected of you.

Break your work tasks and assignments into manageable pieces.

Bring in outside auditors to help identify barriers to increasing quantity.

Come in to work earlier or stay later.

Compete against others to be recognized as a top performer in your department.

Compete against yourself to continually improve your performance.

Improve your job knowledge and skills to achieve greater results.

Improve planning and organizing skills to help increase work quantity.

Maintain daily to-do lists and records.

Record work progress and report it regularly to your manager.

Reprioritize your tasks and to-do lists on a daily basis.

Resist handling too many tasks simultaneously.

FIG. 36

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3701

Final Preview

[Get Advice](#)
[View Progress](#)
[Start Over](#)

[Rate the Performance Competencies](#)
[Define and Rate Goals](#)
[Create the Review Summary](#)
[Plans for Improvement](#)

[prev](#)
[next](#)

Before you have the review sent to you by email or download, we suggest you preview it. Then select NEXT.

If you want to make further changes after previewing, click on any of the following:

3702 [Select Additional Competencies](#)

3703 ☐ [Remove Numeric Ratings from Final Review](#)

3704 ☐ [Remove Rating Descriptions from Final Review](#)

3705 [Add/Change Employee Information](#)

3706 [Change Rating Level Descriptions](#)

Use these links to make final changes before download

You can also refine:

3707 [Rate the Performance Competencies](#)

3708 [Define and Rate Goals](#)

3709 [Create the Review Summary](#)

3710 [Plans for Improvement](#)

When you are finished and ready to receive your completed review, select NEXT above.

Click here to preview the review document online

FIG. 37

3801

Download Review

Get Advice

View Progress

Start Over

Rate the Performance Competencies

Define and Rate Goals

Create the Review Summary

Plans for Improvement

◀prev next▶

Downloading Your Results

Please select the file format and the type of delivery you would like.

Your performance review can be emailed or downloaded directly to you.

When you have made your choices, select Next to continue.

Please select a file format:

3802

3803

3804

☒ .TXT - Text Only - Can be read into any text editing program. However text files will not retain formatting.

☐ HTML - HyperText Markup Language - Coded with HTML tags to be read through a Browser.

☐ .DOC - Rich Text Format - Can be read directly into most word processing software and retain their formatting.

Select the file format for your review document

Please select a delivery method:

3805

3806

☒ DOWNLOAD - Select this option if you want to download your performance review immediately.

☐ EMAIL - Select this option if you want the performance review to be sent to you as an email attachment.

Select a delivery method

Email Address (if you are selecting email)

If you are sending the review by email, enter the full Internet email address here

FIG. 38