

How to Conduct a CPC Appraisal

Within Manager Space this is how you do your employee appraisals.

31 Steps [View most recent version on Tango.us](#) 

Created by

Natasha Bothun

Creation Date

September 29, 2022

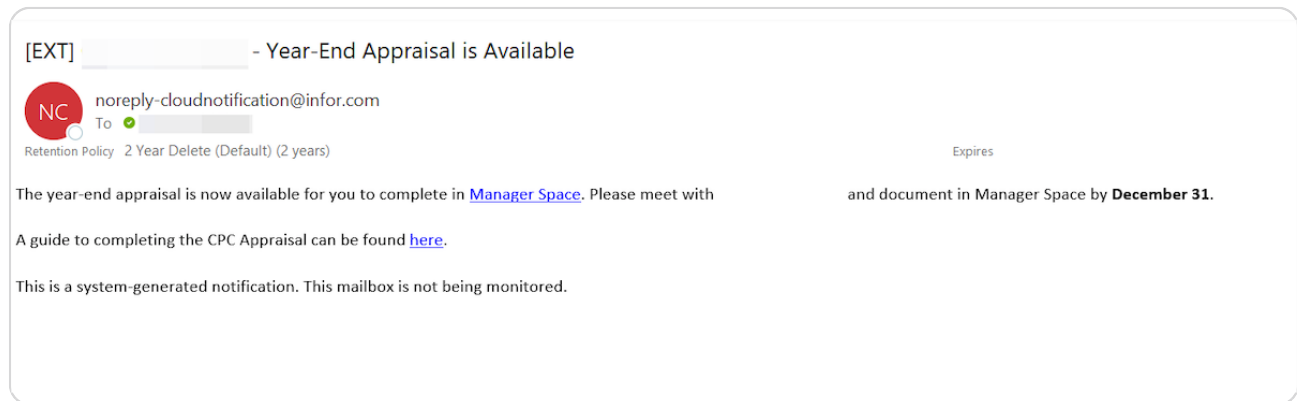
Last Updated

October 17, 2023

STEP 1

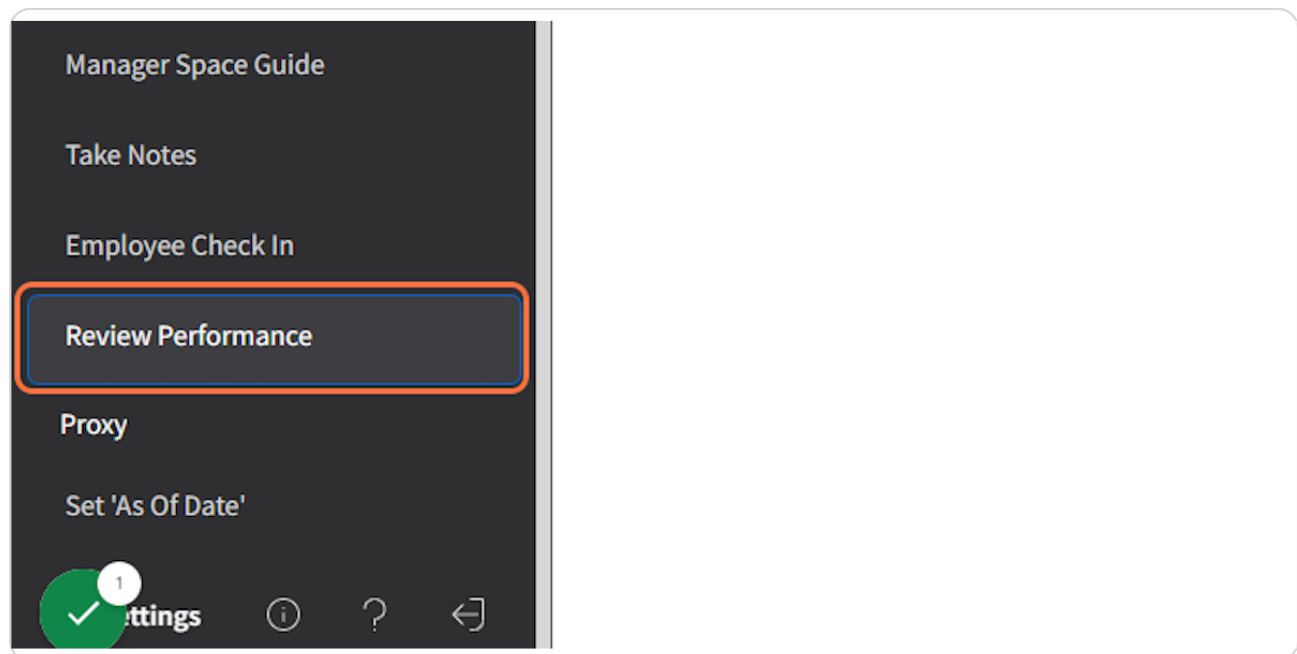
CPC Appraisal Email Notification

An email will be sent to your inbox for each employee you manage notifying you that the appraisal process has begun.



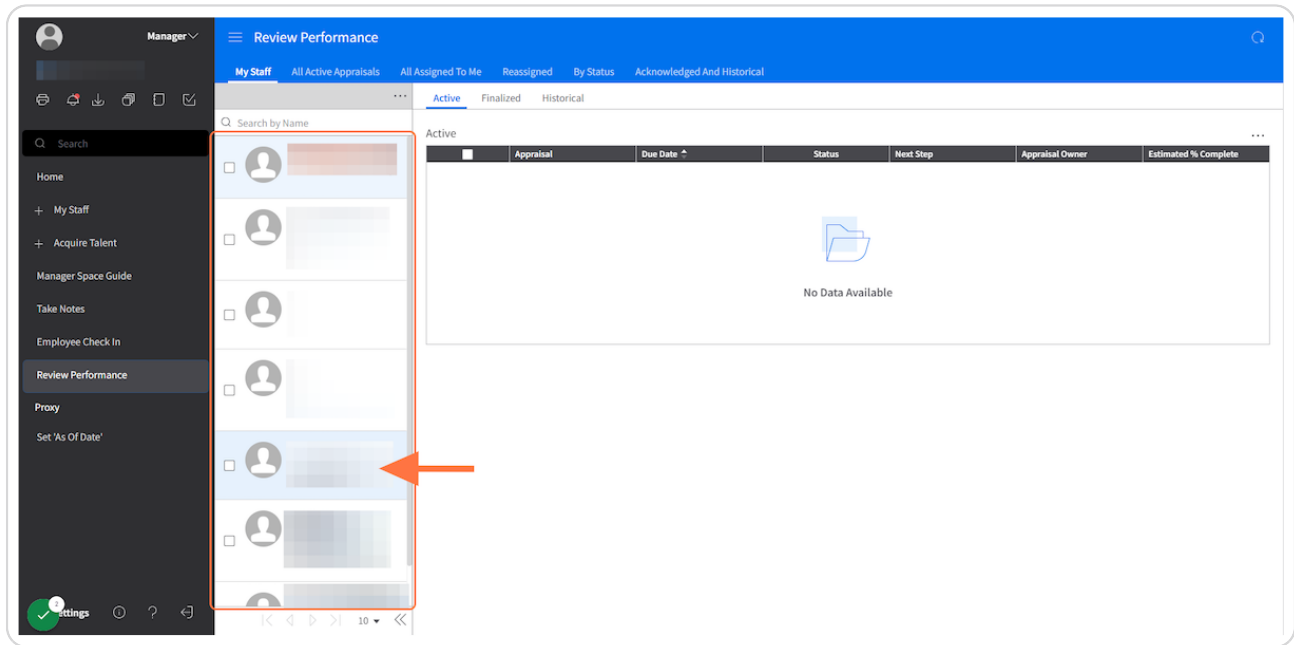
STEP 2

Log into Manager Space. Click on Review Performance on the side bar.



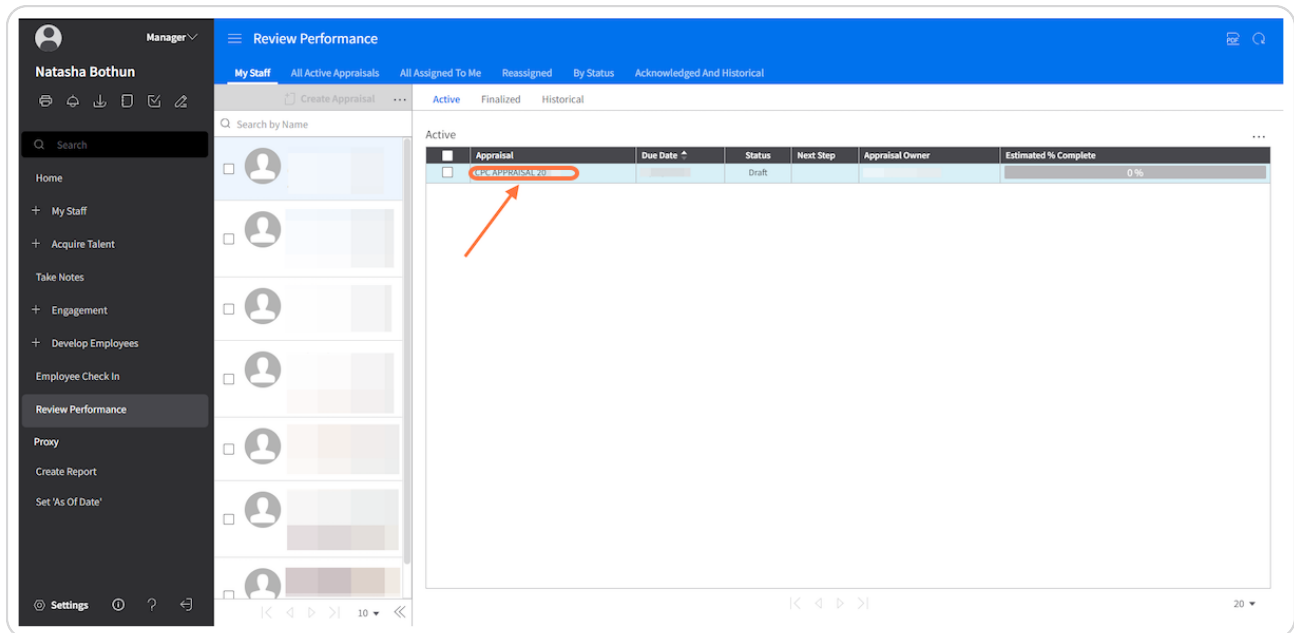
STEP 3

Click the box of the employee you would like to complete an appraisal on. Please note, you only need to click once.



STEP 4

Click on CPC APPRAISAL 20XX



STEP 5

A button will appear above the datagrid entitled "Start Appraisal" Click on Start Appraisal

The screenshot displays the 'Review Performance' interface. On the left is a dark sidebar with navigation options: Home, My Staff, Acquire Talent, Manager Space Guide, Take Notes, Employee Check In, Review Performance (selected), Proxy, and Set 'As Of Date'. The main content area has a blue header with 'Review Performance' and a search icon. Below the header are tabs: 'My Staff', 'All Active Appraisals', 'All Assigned To Me', 'Reassigned', 'By Status', and 'Acknowledged And Historical'. The 'All Active Appraisals' tab is active, showing sub-tabs 'Active', 'Finalized', and 'Historical'. A search bar 'Search by Name' is present. Below it is a list of staff members with checkboxes. The 'Active' sub-tab shows a datagrid with columns: Appraisal, Due Date, Status, Next Step, Appraisal Owner, and Estimated % Complete. The first row is 'CPC Appraisal 200X' with status 'Draft' and '0 %' completion. Above the datagrid, a 'Start Appraisal' button is highlighted with a red box and an orange arrow. To the right of the button is a 'Consolidated Appraisal' link. At the bottom right of the datagrid is a '20' dropdown menu.

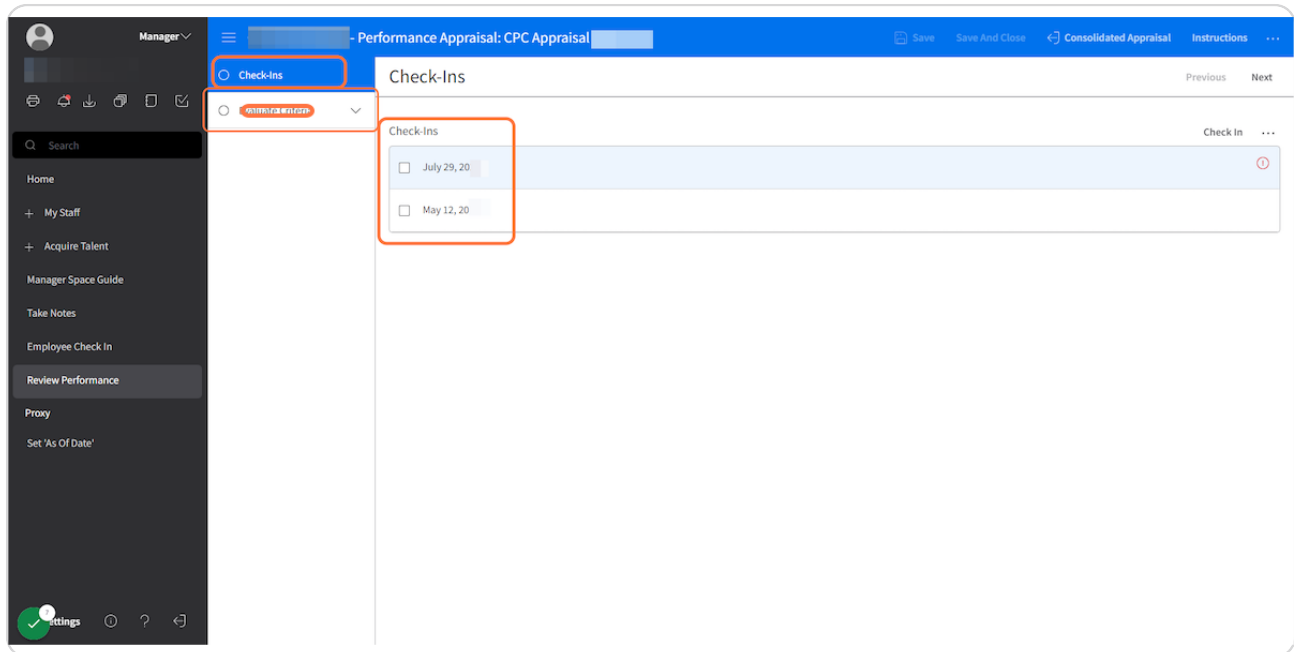
Appraisal	Due Date	Status	Next Step	Appraisal Owner	Estimated % Complete
<input checked="" type="checkbox"/> CPC Appraisal 200X		Draft			0 %

STEP 6

Review Check-Ins from the year.

Double Click on a date to pull up the check-in.

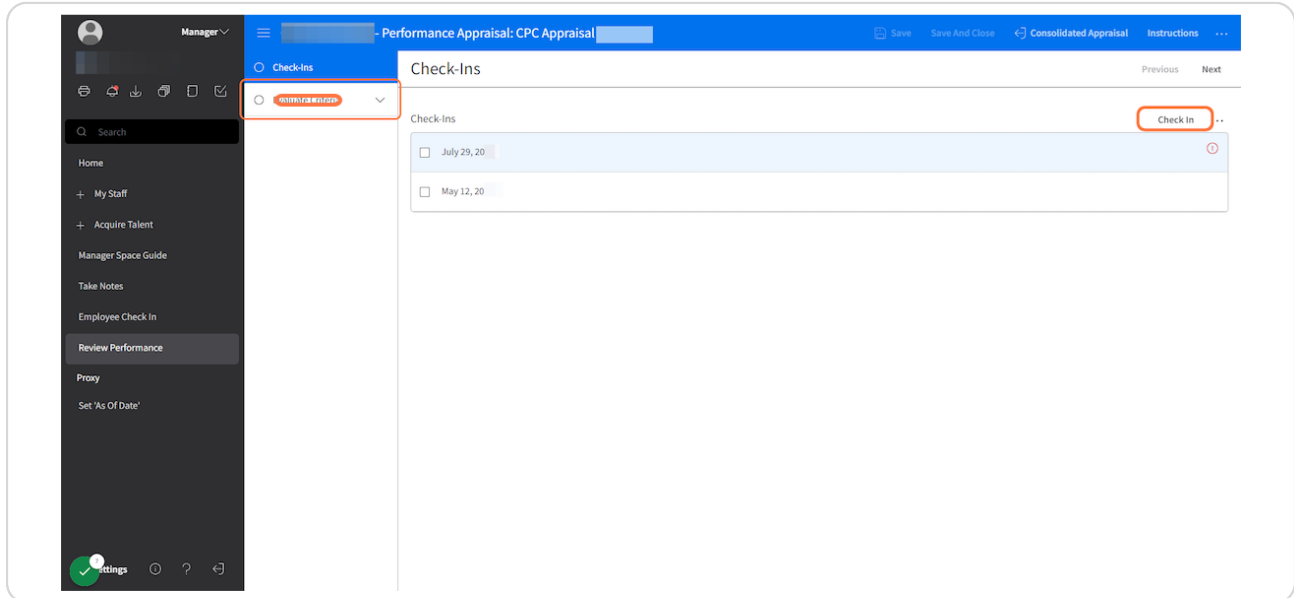
You may find a red exclamation mark by a check-in. This exclamation mark indicates that the check-in has not been acknowledge by the employee. While we encourage acknowledgment of check-ins, they are not required at this time.



STEP 7

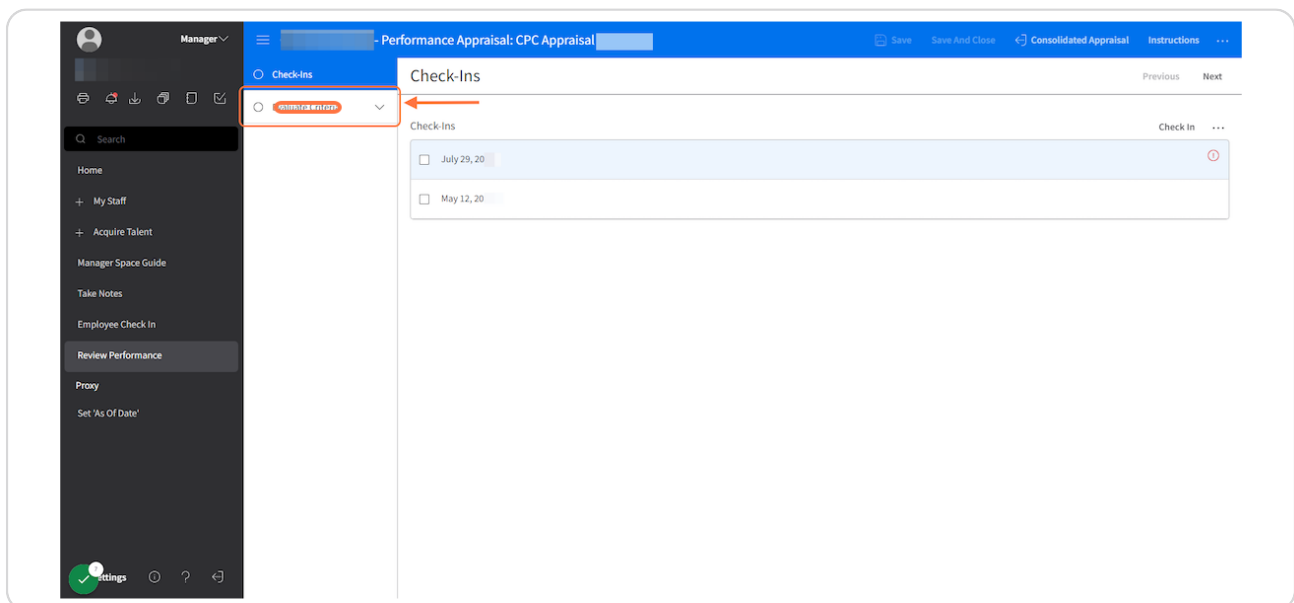
You may fill out a new check-in at this time if necessary. To do so, click the check-in button on the screen.

A check-in is not required for the appraisal but is an option for any supervisor who would like to include that into the process.



STEP 8

Click on Evaluate Criteria



Fill out the first rating on job performance.

Please fill out the comments section regarding the employee's job performance.

Created with *Tango*

STEP 11

Fill out the second rating on interpersonal behavior.

The screenshot shows the 'Performance Appraisal: CPC Appraisal' interface. The left sidebar contains navigation options: Home, My Staff, Acquire Talent, Manager Space Guide, Take Notes, Employee Check In, Review Performance (selected), Proxy, and Set 'As Of Date'. The main content area is titled 'Evaluate Criteria' and includes a 'CPC Rating Section' tab. The 'Interpersonal Behavior' criterion is highlighted with an orange arrow. The rating options are: Did Not Meet Expectations, Partially Met Expectations, Met Expectations, and Exceeded Expectations (selected). The 'Comments' section is empty.

STEP 12

Please fill out the comments section regarding the employee's interpersonal behavior..

The screenshot shows the same 'Performance Appraisal: CPC Appraisal' interface. The 'Interpersonal Behavior' criterion is still selected. The 'Comments' section is now filled with the text 'Great - Test'.

If you have comments you would like to leave on the employee's overall performance for the year, please put them here.

STEP 14

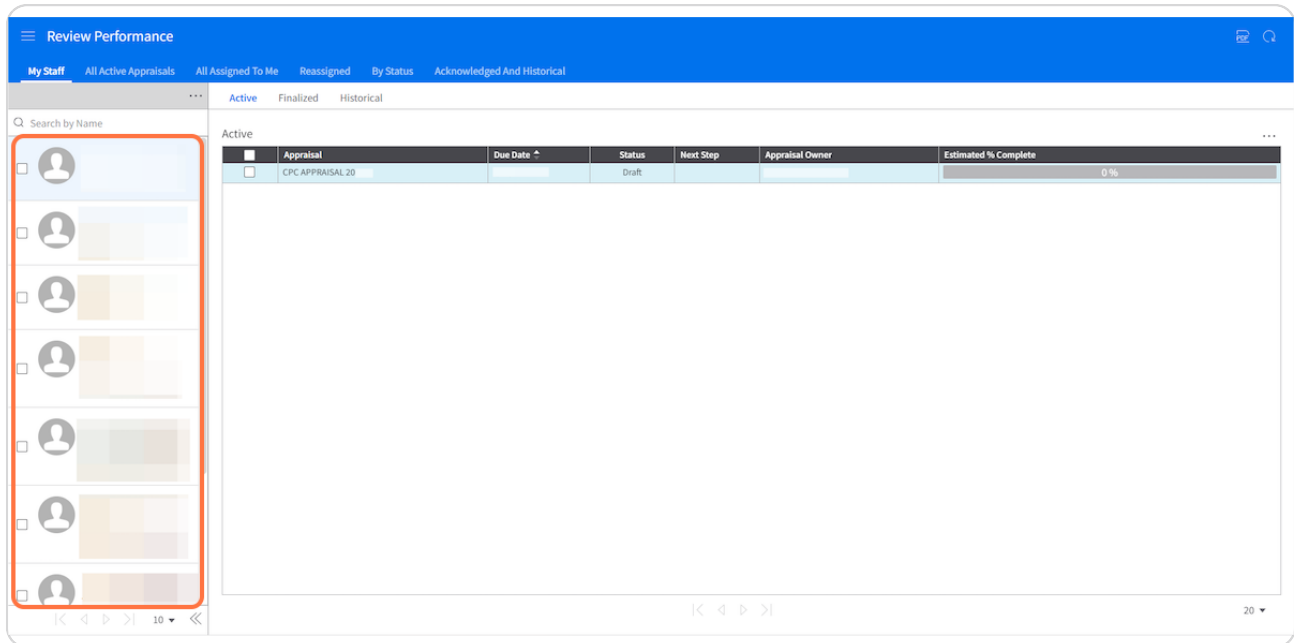
[illegible]

STEP 15

Set up meeting with employee to go over appraisal results.

STEP 16

During the meeting, go back into the appraisal in Manager Space by following steps 1-2. Then single click the employee you are reviewing.



STEP 17

Click on CPC Appraisal 20XX.

The screenshot shows the 'Review Performance' interface. The top navigation bar is blue with the title 'Review Performance'. Below it, there are tabs: 'My Staff', 'All Active Appraisals', 'All Assigned To Me', 'Reassigned', 'By Status', and 'Acknowledged And Historical'. The 'Active' tab is selected. On the left, there is a search bar 'Search by Name' and a list of staff members. The main area displays a table with the following columns: 'Appraisal', 'Due Date', 'Status', 'Next Step', 'Appraisal Owner', and 'Estimated % Complete'. The first row is 'CPC APPRAISAL 20', which is highlighted in blue. A red arrow points to the 'CPC APPRAISAL 20' entry. The 'Status' is 'In Progress' and the 'Estimated % Complete' is '50 %'. The bottom of the interface shows pagination controls and a page number '20'.

STEP 18

Click Continue Appraisal

The screenshot shows the 'Review Performance' interface. The top navigation bar is blue with the title 'Review Performance'. Below it, there are tabs: 'My Staff', 'All Active Appraisals', 'All Assigned To Me', 'Reassigned', 'By Status', and 'Acknowledged And Historical'. The 'Active' tab is selected. On the left, there is a search bar 'Search by Name' and a list of staff members. The main area displays a table with the following columns: 'Appraisal', 'Due Date', 'Status', 'Next Step', 'Appraisal Owner', and 'Estimated % Complete'. The first row is 'CPC APPRAISAL 20', which is highlighted in blue. The 'Status' is 'In Progress' and the 'Estimated % Complete' is '50 %'. Above the table, there are buttons: 'Continue Appraisal' (highlighted with a red circle), 'Finalize Appraisal', and 'Consolidated Appraisal'. The bottom of the interface shows pagination controls and a page number '20'.

STEP 19

If there are items you need to update while meeting with the employee, please do so.

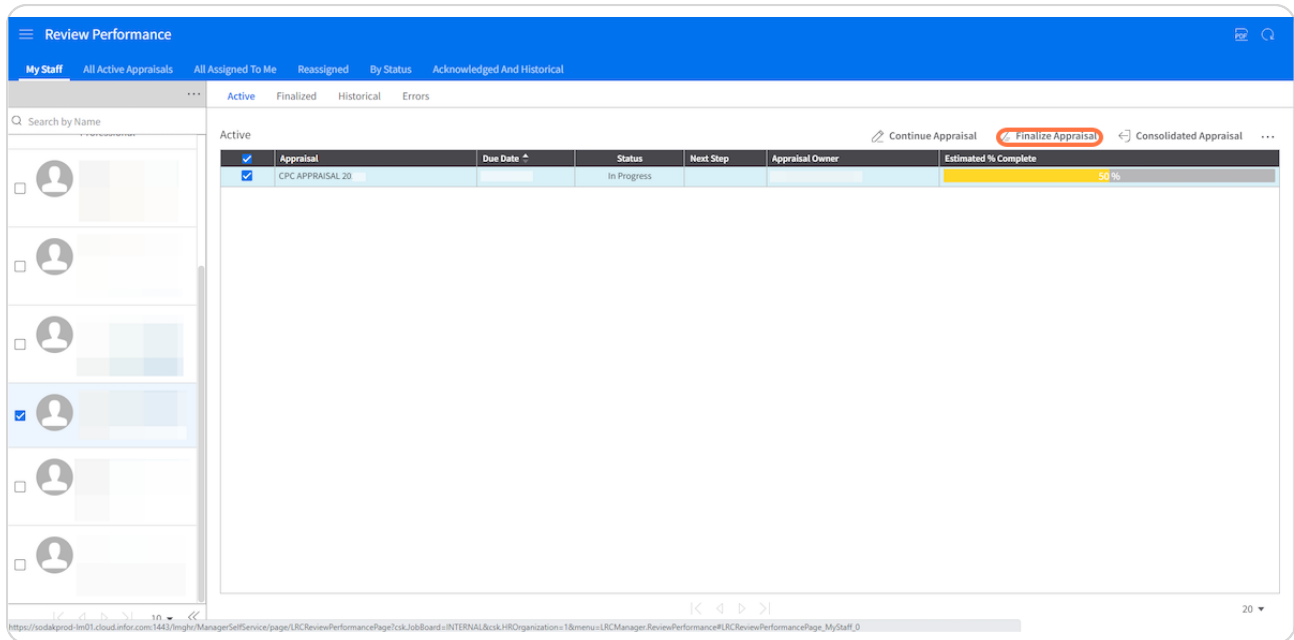
STEP 20

Click Finish

When your meeting is complete and you are satisfied with your comments and ratings, click finish.

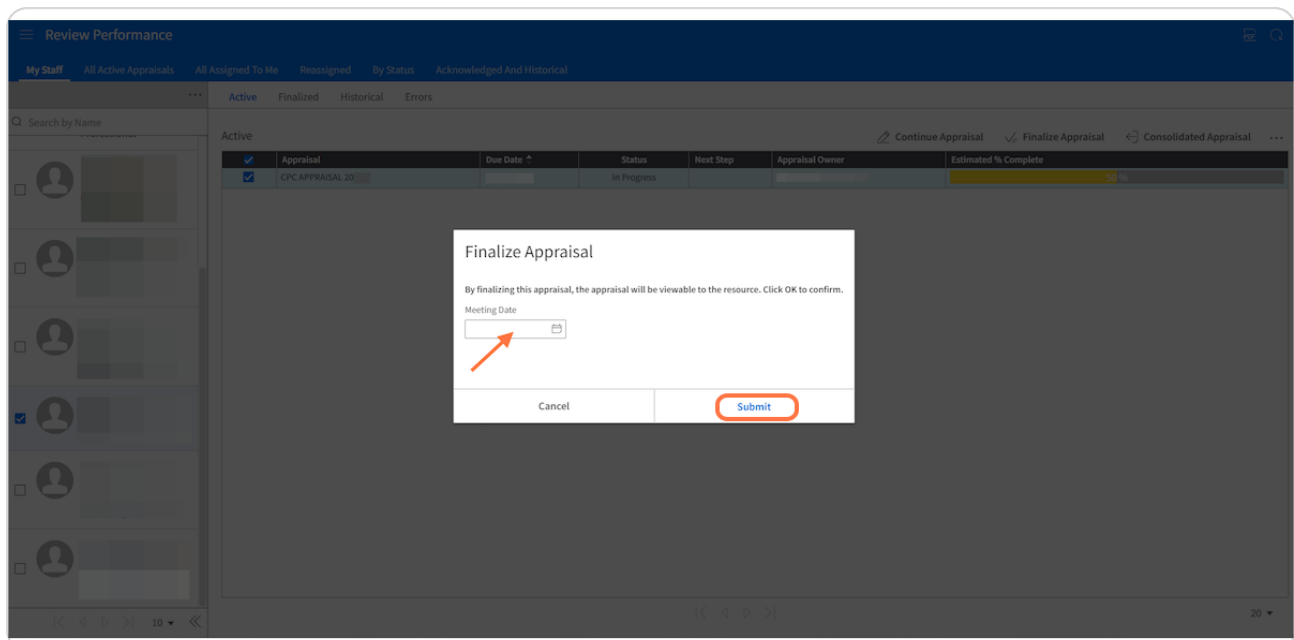
STEP 21

Click Finalize Appraisal



STEP 22

Type in the date of the meeting and click submit.



STEP 23

Select the Finalized Tab

The screenshot shows the 'Review Performance' interface. The top navigation bar is blue with a hamburger menu icon on the left and a refresh icon on the right. Below the bar, there are tabs: 'My Staff', 'All Active Appraisals', 'All Assigned To Me', 'Reassigned', 'By Status', and 'Acknowledged And Historical'. The 'My Staff' tab is active. On the left side, there is a search bar labeled 'Search by Name' and a list of staff members, each with a checkbox and a profile picture. The fourth staff member is selected. The main area shows a table with the following columns: 'Appraisal', 'Due Date', 'Status', 'Next Step', 'Appraisal Owner', 'Overall Rating', and 'Meeting Date'. The 'Finalized' tab is selected, and the table contains one row: 'CPC APPRAISAL 20XX'. An orange arrow points to the 'Finalized' tab.

Appraisal	Due Date	Status	Next Step	Appraisal Owner	Overall Rating	Meeting Date
CPC APPRAISAL 20XX		Finalized				

STEP 24

Click CPC Appraisal 20XX

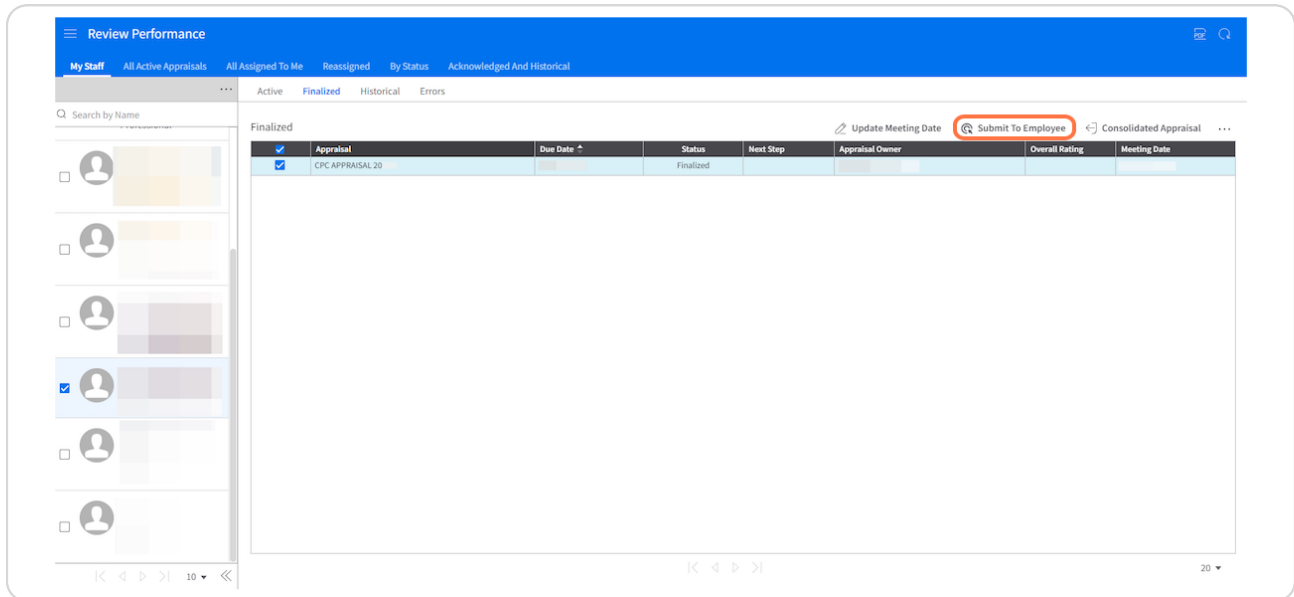
The screenshot shows the 'Review Performance' interface. The top navigation bar is blue with a hamburger menu icon on the left and a refresh icon on the right. Below the bar, there are tabs: 'My Staff', 'All Active Appraisals', 'All Assigned To Me', 'Reassigned', 'By Status', and 'Acknowledged And Historical'. The 'My Staff' tab is active. On the left side, there is a search bar labeled 'Search by Name' and a list of staff members, each with a checkbox and a profile picture. The fourth staff member is selected. The main area shows a table with the following columns: 'Appraisal', 'Due Date', 'Status', 'Next Step', 'Appraisal Owner', 'Overall Rating', and 'Meeting Date'. The 'Finalized' tab is selected, and the table contains one row: 'CPC APPRAISAL 20XX'. The row is highlighted with a red border.

Appraisal	Due Date	Status	Next Step	Appraisal Owner	Overall Rating	Meeting Date
CPC APPRAISAL 20XX		Finalized				

STEP 25

Click Submit To Employee

** This step is easily missed – PLEASE remember to push **Submit to Employee!**



The screenshot shows the 'Review Performance' interface. On the left, there is a sidebar with a search bar and a list of employee profiles. The main area displays a table of 'Finalized' appraisals. The table has columns for 'Appraisal', 'Due Date', 'Status', 'Next Step', 'Appraisal Owner', 'Overall Rating', and 'Meeting Date'. A red circle highlights the 'Submit To Employee' button in the top right corner of the table area.

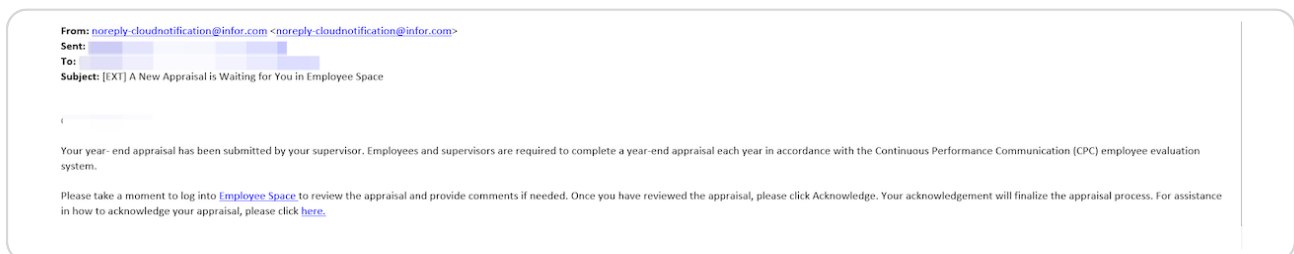
Appraisal	Due Date	Status	Next Step	Appraisal Owner	Overall Rating	Meeting Date
CPC APPRAISAL 20		Finalized				

STEP 26

Your employee will receive an email regarding the appraisal.

Your employee will receive an email in their inbox letting them know an appraisal has been submitted on them and needs their attention.

Please make sure your employees go out and acknowledge the appraisal. The appraisal will not be complete until the acknowledgement has happened.



The screenshot shows an email notification from noreply-cloudnotification@infor.com. The subject is '[EXT] A New Appraisal is Waiting for You in Employee Space'. The body of the email states: 'Your year-end appraisal has been submitted by your supervisor. Employees and supervisors are required to complete a year-end appraisal each year in accordance with the Continuous Performance Communication (CPC) employee evaluation system. Please take a moment to log into [Employee Space](#) to review the appraisal and provide comments if needed. Once you have reviewed the appraisal, please click Acknowledge. Your acknowledgement will finalize the appraisal process. For assistance in how to acknowledge your appraisal, please click [here](#).'

STEP 27

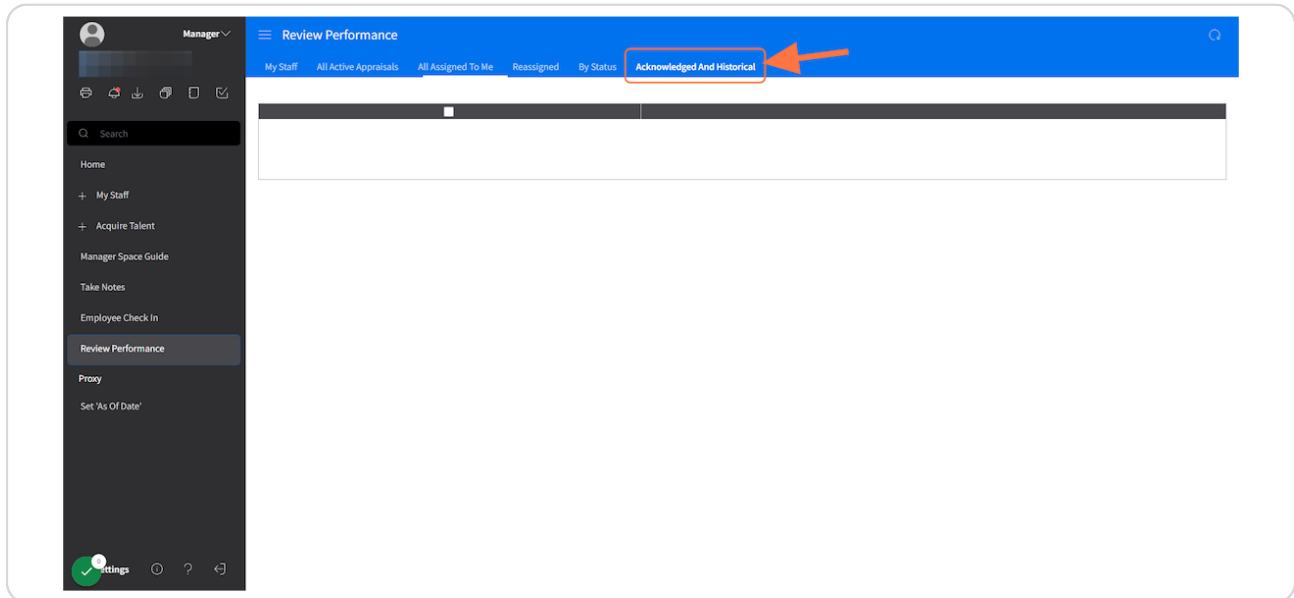
Check to make sure the acknowledgment has happened.

STEP 28

Log Into Manager's Space and go to Review Performance again.

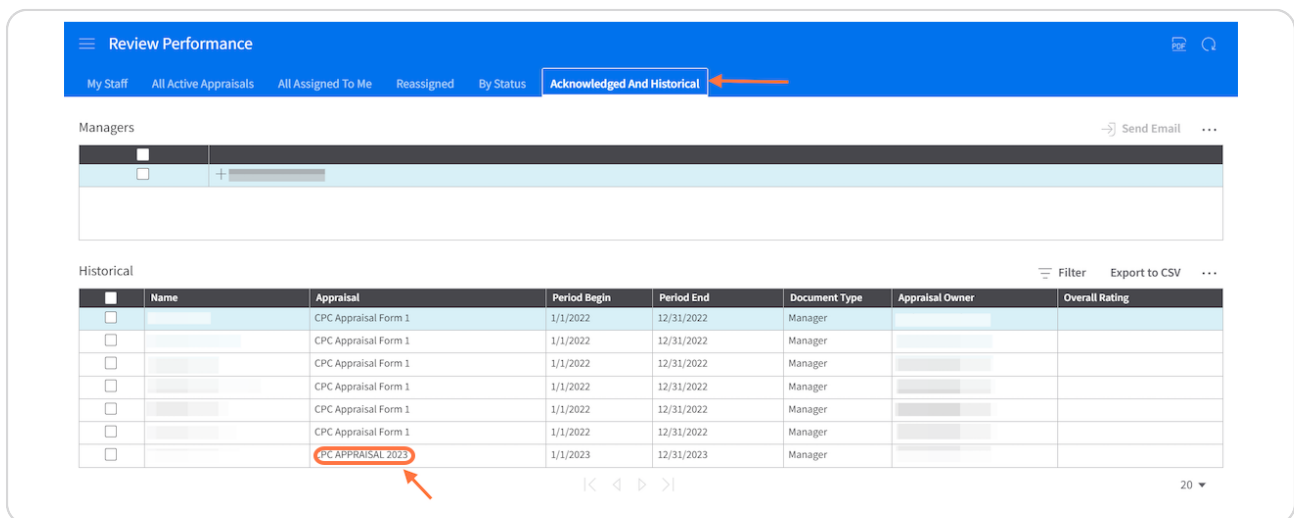
STEP 29

Click on Acknowledged And Historical



STEP 30

All appraisals that have been acknowledged will show up here.



STEP 31

Congratulations! The Process is Complete!

Tango

Never miss a step again. Visit [Tango.us](https://tango.us)