

How to Conduct a CPC Appraisal (Quick Guide)

This is a quick reference guide for conducting a CPC Appraisal within Manager Space, for step-by-step photos of the process, please refer to the [How to Conduct A CPC Appraisal Guide](#).

You will receive an email notification (for each employee) from noreply-cloudnotification@infor.com once the CPC Appraisal process has begun.

Before starting, review the [Guidelines for CPC Appraisal Ratings](#) and utilize the [CPC Appraisal Prep Tool](#). Manager Space times out frequently and does NOT save work or progress.

If you don't use the prep tool for ongoing employee documentation throughout the year, refer to past check-ins ([CPC Check-In Prep Tool](#)) or other employee documentation.

1. Log into Manager Space (Manager role).
2. Click on Review Performance in the left-hand menu.
3. Select the All Assigned To Me tab.
4. Select the appraisal you would like to complete. "CPC Appraisal 20XX"
Disregard previous years' incomplete appraisals – these cannot be removed from the system for historical tracking purposes. Once selected, new buttons will appear above the data grid titled.
5. Click on Start Appraisal.
6. Review Check-ins from the past year by double-clicking on a date to pull up the check-in.
A red exclamation mark indicates check-ins that have not been acknowledged by the employee.
OR fill out a new check-in by clicking the check-in button.
A minimum of 2 check-ins are REQUIRED each year, however, BHRA recommends completing 1 per quarter.
7. Click Next
8. Click on CPC Rating Section
Choose the correct button for expectations and fill out the appropriate comments for each section. If you have additional comments you would like to leave on the employee's overall performance for the year, please leave them in the overall comments section.
9. Click Finish.
After clicking finish you will be redirected to the All Assigned To Me tab.
10. Meet with the employee to review their appraisal.
After meeting with the employee, follow steps 3 through 6 again, then continue to step 14.
11. Click on the Submit button.
12. Enter the date you met with the employee.
13. Click Submit again to send the appraisal to the employee for acknowledgment.
The employee will now receive an email notifying them that the appraisal is ready for their acknowledgment.
14. Congratulations your work is done!

Return to Manager Space frequently to track acknowledgments. Appraisals are considered **INCOMPLETE** until they have been acknowledged by the employee.