



NASDA Performance Review

(Manager and Supervisor Instructions)



Welcome to NASDA's New Performance Review System!

NASDA is very excited to implement an online tool to manage all performance reviews through iSolved. There are couple of upgrades we have made to the old evaluation process.

New Metric Rating

- 1) Unsatisfactory
- 2) Needs Improvement
- 3) Effective
- 4) Highly Effective
- 5) Exceptional

Additional Categories

- 1) Job knowledge
- 2) Quality of Work
- 3) Accountability
- 4) Motivation
- 5) Teamwork
- 6) Communication

Please visit the NASDA NASS website [Personnel Resources > Handbooks](#) to view a list of training materials

Videos

- 1) NASDA Performance Review (Manager and Supervisor Tutorial)
- 2) NASDA Enumerator Acknowledging and Signing Performance Evaluation Tutorial
- 3) How to Evaluate NASDA Employees Tutorial

Written Instructions

- 1) NASDA Performance Review (Manager and Supervisor Instructions)
- 2) NASDA Enumerator Acknowledging and Signing Performance Evaluation Instructions
- 3) NASDA Metric Rating Handout

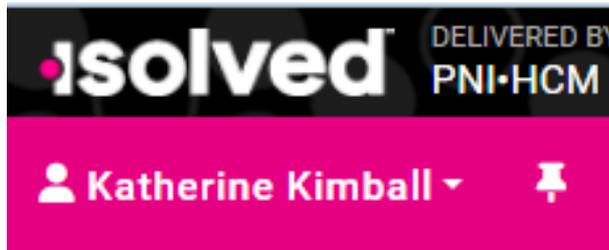
Step 1:

Log into iSolved and switch to **Manager** or **Supervisor View**

The screenshot displays the iSolved Human Capital Management interface. At the top left, the logo "iSolved" is followed by "Human Capital Management" and "Delivered by Payroll Network". The user is logged in as "Test Supervisor" for "Client: 1500 - NASDA". A dropdown menu is open, showing "Employee View" and "Supervisor View" (which is selected with a checkmark). Other menu items include Home, My Account, University, Logout, and Performance Reviews. The main dashboard area is titled "My Dashboard" and contains an "Options" section with links for Pending Transactions, Alert Monitoring, Employee Punch Status, and Earnings Summary of Hours. On the right, two status messages are shown: "You have No Pending Time Off Requests" and "You have No Pending Transactions", both with green checkmarks.

Step 2:

Under **EMPLOYEE MANAGEMENT**, select **Human Resources/Performance**



Search the menu



Step 3:

Initiate a Review

There are two options to initiate a review:

1) Add Review

This option is used to schedule and complete a review right away. Managers and Supervisors should use this option if they did not schedule the review prior to the review date. **(We will review this process first)**

OR

2) Schedule Review

This option allows the Manager or Supervisor to schedule a review ahead of time and complete at a later date.

Add Review: Step 4

Under Performance, select **Add Review**. Type in the name of your employee in the **Employee Search** bar and choose the **Get Results** button.

The screenshot displays the 'EMPLOYEE MANAGEMENT' interface. On the left, a navigation menu is open, with 'Add Review' selected. The main area shows a search bar labeled 'Employee Search' highlighted in yellow, and a 'Get Results' button. Below the search bar, there are filter options for 'Legal Name', 'Pay Group', 'Org Category', 'Value', 'Status', and 'Pay Type'. A message above the filters states: 'There are more than 500 active employees in the list. You can search by employee or select filter options to retrieve results.' Below the filters, there are options to 'Expand All Groups', 'Collapse All Groups', and 'Clear Grouping/Filters'. At the bottom, a table header is visible with columns: Legal Name, Pay Group, Hire Date, Employee ..., First Name, Preferred ..., Middle Na..., Last Name, SSN, and Status. Each column has a search icon below it.

Legal Name	Pay Group	Org Category	Value	Status	Pay Type	Employee Search	Get Results
National Assc	ALL	ALL		Active	ALL		

▼ Expand All Groups ▲ Collapse All Groups ↻ Clear Grouping/Filters

Drag a column header here to group by that column

Legal Name	Pay Group	Hire Date	Employee ...	First Name	Preferred ...	Middle Na...	Last Name	SSN	Status
🔍	🔍	🔍	📅 🔍	🔍	🔍	🔍	🔍	🔍	🔍

Add Review: Step 5

- Enter the **Review Date** (today's date automatically populates, click on the calendar or type in the date box to change it)
- Skip the **Next Review Date**
- Enter the **Period Start Date** (1/1/XX) and **Period End Date** (12/31/XX) where XX is the previous year for Annual Reviews or enter survey dates for Survey Review.
- Select the **Review Type** (Annual or Survey Review)
- Select **Review** (Field Enumerator, Field Supervisor, Office Enumerator, Office Supervisor, or Coach). Type your name in the **Reviewer** box
- Click **NEXT** when all required fields have been entered or selected.

Search the menu

EMPLOYEE MANAGEMENT

- Performance
- Awards
- Occurrences
- Corrective Actions
- Add Review**
- Schedule Review
- Review History
- Regulatory

EMPLOYEE ADMIN TOOLS

EMPLOYEE SELF-SERVICE

CLIENT MANAGEMENT

Add Review

[→ Next](#)

Review

Use this screen to add and complete a review that was not previously scheduled

* Review Date:

Next Review Date:

Period Start Date:

Period End Date:

* Review Type:

* Review:

* Reviewer:



Add Review: Step 6

- You can now begin completing each question in the evaluation. Some questions require only a typed answer in the **Comments** section.
- To move from one question to the next, click **NEXT**
- To move to a previous question, click **Previous**

Performance Review History

← Previous → Next 🖨 View

If survey evaluation please note survey name.

Comments:

Add Review: Step 7

- For questions requiring a rating, use the drop menu to select the appropriate **RATING**
- Add **Comments** in the comment box to support any rating you give an Enumerator or Supervisor
- Click **NEXT** to move to the next question

Add Review

← Previous → Next 🖨 View

TRAINING PERFORMANCE 1. Home study 2. Attended training 3. Participated in training

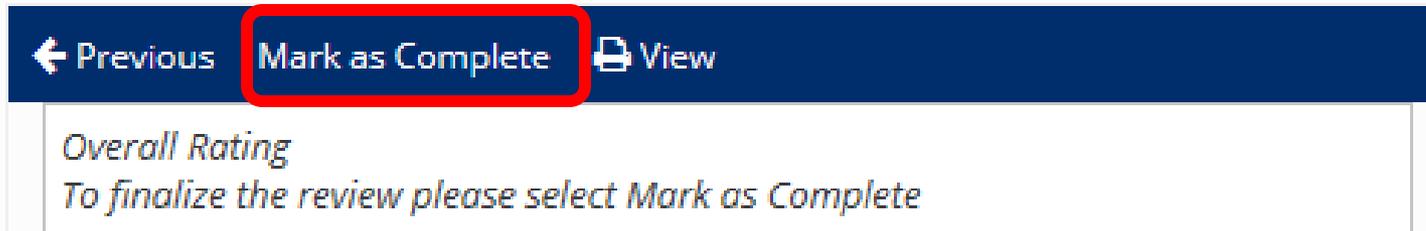
Rating:
Comments:

Unsatisfactory - 5
Needs Improvement - 10
Effective - 15
Highly Effective - 20
Exceptional - 30

Add Review: Step 8

- After all questions have been answered, finalize the review by clicking the **Mark as Complete** button.
- You can also click **View** which will give you a PDF version of the performance evaluation.

Performance Review History



- After the Mark as Complete button has been clicked, an email alerting the Enumerator to sign and acknowledge the evaluation will be sent.

Schedule Review: Step 4

Under EMPLOYEE MANAGEMENT, **Human Resources, Performance**, select **Schedule Review**. Type in the name of your employee in the **Employee Search** bar and choose the **Get Results** button.

The screenshot displays the 'Employee List' interface. On the left, a navigation menu is visible with 'EMPLOYEE MANAGEMENT' highlighted. Under this menu, 'Schedule Review' is selected. The main area shows a search bar labeled 'Employee Search' and a 'Get Results' button. Below the search bar, there are filter options for 'Legal Name', 'Pay Group', 'Org Category', 'Value', 'Status', and 'Pay Type'. A black bar contains options to 'Expand All Groups', 'Collapse All Groups', and 'Clear Grouping/Filters'. Below this, a message says 'Drag a column header here to group by that column'. At the bottom, a table header is visible with columns: Legal Name, Pay Group, Hire Date, Employee ..., First Name, Preferred ..., Middle Na..., Last Name, SSN, and Status.

Search the menu

EMPLOYEE MANAGEMENT

- Awards
- Occurrences
- Corrective Actions
- Add Review
- Schedule Review**
- Review History

Employee List

There are more than 500 active employees in the list. You can search by employee or select filter options to retrieve results.

Legal Name Pay Group Org Category Value Status Pay Type **Employee Search** **Get Results**

▼ Expand All Groups ▲ Collapse All Groups ↻ Clear Grouping/Filters

Drag a column header here to group by that column

Legal Name	Pay Group	Hire Date	Employee ...	First Name	Preferred ...	Middle Na...	Last Name	SSN	Status
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Schedule Review: Step 5

- Select **Add New**, then enter the **Review Date** and skip the **Next Review Date**
- Enter the **Period Start Date** (1/1/XX) and **Period End Date** (12/31/XX) where XX is the previous year for Annual Reviews or enter survey dates for Survey Review.
- Select the **Review Type** (Annual or Survey Review)
- Select **Review** (Field Enumerator, Field Supervisor, Office Enumerator, Office Supervisor, or Coach)
- Choose the **Save** button

Search the menu

EMPLOYEE MANAGEMENT

- Performance ▾
- Awards
- Occurrences
- Corrective Actions
- Add Review
- Schedule Review**
- Review History
- Regulatory ▸

EMPLOYEE ADMIN TOOLS

EMPLOYEE SELF-SERVICE

CLIENT MANAGEMENT

PAYROLL PROCESSING

REPORTING

Schedule Review

Review Date	Period Start Date	Period End Date
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+ Add New Edit Delete Refresh Save Cancel Print

Review

Use this screen to schedule a review that will be available on the ESS pending reviews screen for completion

* Review Date:

Next Review Date:

Period Start Date:

Period End Date:

* Review Type: ▾

* Review: ▾

Schedule Review: Step 6

- Under **EMPLOYEE MANAGEMENT, Human Resources, Performance** select **Review History**
- Select the specific review for the employee that was scheduled, click **START** then **NEXT** to complete the evaluation.



Schedule Review: Step 7

- You can now begin completing each question in the evaluation. Some questions require only a typed answer in the **Comments** section.
- To move from one question to the next, click **NEXT**
- To move to a previous question click, **Previous**

Performance Review History

[← Previous](#) [→ Next](#) [🖨 View](#)

If survey evaluation, please note survey name.

Comments:

Schedule Review: Step 8

- For questions requiring a rating, use the drop menu to select the appropriate **RATING**
- Add **Comments** in the comment box to support any rating you give an Enumerator or Supervisor
- Click **NEXT** to move to the next question

Add Review

← Previous → Next 🖨 View

TRAINING PERFORMANCE 1. Home study 2. Attended training 3. Participated in training

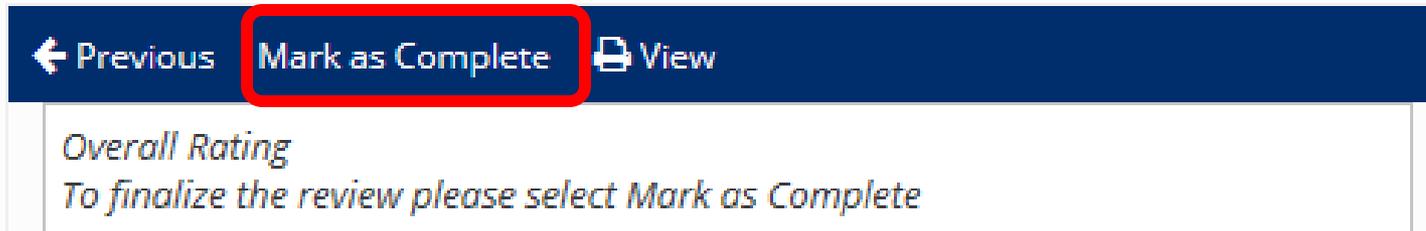
Rating:
Comments:

Unsatisfactory - 5
Needs Improvement - 10
Effective - 15
Highly Effective - 20
Exceptional - 30

Schedule Review: Step 9

- After all questions have been answered, finalize the review by clicking the **Mark as Complete** button.
- You can also click **View** which will give you a PDF version of the performance evaluation.

Performance Review History



- After the Mark as Complete button has been clicked, an email alerting the Enumerator to sign and acknowledge the evaluation will be sent.

Performance Review Reports

- **Performance Reviews Completed (Date Range)**
 - Displays employees that have completed performance reviews.
- **Performance Reviews Scheduled (Date Range)**
 - Displays employees that have performance reviews schedule
- **Performance Review Past Due (Date Range)**
 - Displays employees who have scheduled performance reviews that are past due
- To access the reports, choose **REPORTING** and then **CLIENT REPORTS**

Client Reports

Report Category:

Search:

▲ Output Name	◆ Report Type
Performance Review Past Due	Date Range
Performance Reviews Completed	Date Range
Performance Reviews Scheduled	Date Range

 Generate Report  Go To My Reports Queue

Once your report request has been submitted you can do My Reports Queue for 72 hours.

Performance Review Past Due

Filtering