STAFF PERFORMANCE REVIEWS –QUICK REFERENCE

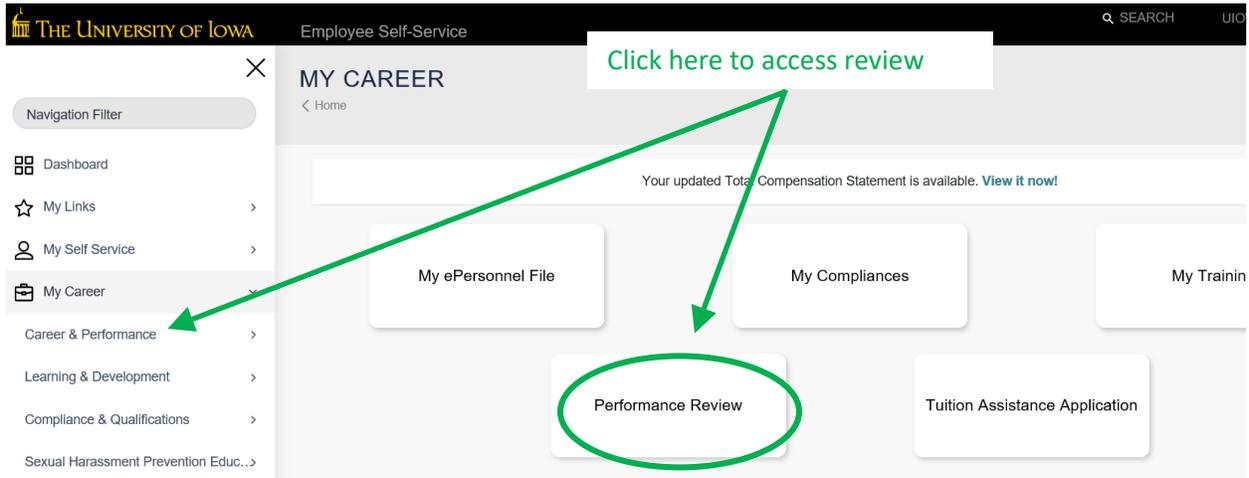## **2021 CoE Performance Review Process**

1. Employee creates review in Performance Review tool (accessed in Self Service).
2. Employee completes review form and routes electronically to supervisor via Performance Review tool.
3. Supervisor completes their part of the review form.
4. Supervisor conducts review session with employee (virtual or in-person).
5. Supervisor electronically routes review form to employee for acknowledgement. (This can be done prior to or following the review session, based on supervisor preference.)
6. Employee electronically signs review, adding optional comments.
7. Review is automatically added to ePersonnel and rating is recorded in HR system.

All CoE reviews must be complete (electronically signed by employee) no later than **October 22, 2021**.

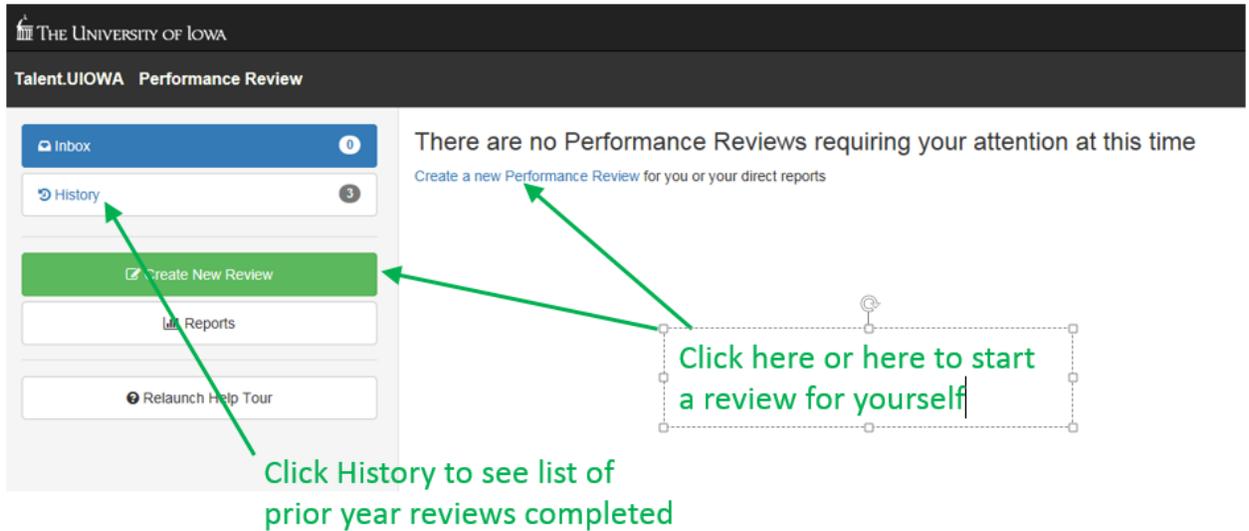# STAFF PERFORMANCE REVIEWS –QUICK REFERENCE

HOW TO USE THE PERFORMANCE REVIEW TOOL

Accessing the Performance Review Tool. Performance Reviews are completed via a tool accessible in Employee Self Service under My Career / Career & Performance.

STEP 1 – Employee Comments. There are three steps in the performance review process. The first step is the employee self-evaluation. The employee initiates the review form and completes their part of it before sending on to the supervisor.

The first time you access the system, you will have an empty inbox. To start a performance review for YOU (the employee), click Create New Review. There are also links to prior reviews (both your own reviews as well as any you completed as supervisor) for your reference.

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When you open up the review form, this is what you will see.   You can scroll down past this summary information. Note: as you progress through the form, there are red or green boxes in each section telling you whether that section requires entry.

If you wish to look at your last year's review, there is a link to do so.

Enter your self-evaluative comments about the 3 Universal Competencies. **These three text boxes are required.** Alternately, you can type "see attached" and address these areas in an attachment.

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Scroll down to the Goals & Accomplishments section. Enter your self-evaluative comments about the achievement of any goals that were set for you in the text box. If you prefer, you can write up a summary of your goal achievement in a separate document and attach it to the review. If you do that, simply type "See Attachment".

Employee Goals & Accomplishments   Optional

Write a summary of your accomplishments & goal achievement during this performance period

> Provide self evaluation comments
> about your achievement of goals here

Scroll down to the Employee Performance Documents section. This is where you can attach documents about your goals, as well as other review-related documents. It is optional to attach documents.

Employee Performance Documents   Optional

Performance Review Documents may be added to provide additional details to this evaluation. Your Org/Department may provide standardized template or additional document requirements that are part of your review. If you are not sure which documents to use, please consult with your supervisor or HR Representative. **All uploaded documents have the option to be added to the ePersonnel file once the evaluation is complete.**

Drag & drop files here to upload

⊕ Select a File to Upload

Scroll down to the Additional Comments section. Enter any overall comments you have about your personal performance this year. You'll also be able to add comments at the end of the review process (after you've met with your supervisor and read his/her comments) when you electronically sign the finalized review form.

Employee Additional Comments   Optional

Please add any additional comments to your review

Once you have completed all of the review form sections, you are done with STEP 1 – Employee Comments and are ready to send the form on to your supervisor. To do that, click the GREEN button (Submit Performance Review) to send it to your supervisor so they can read your comments and enter their own.   If you aren't able to finish your review in one sitting, clicking Save for Later will save the draft for you to come back to.

Submit Performance Review   Save for Later

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STEP 2 – Supervisor Comments & Rating. In the second step, the supervisor provides comments about their assessment of the employee's performance. They will also provide a performance rating.

Once an employee has submitted their review to the supervisor, it will appear in the supervisor's inbox. Click on the employee name to access the review form.
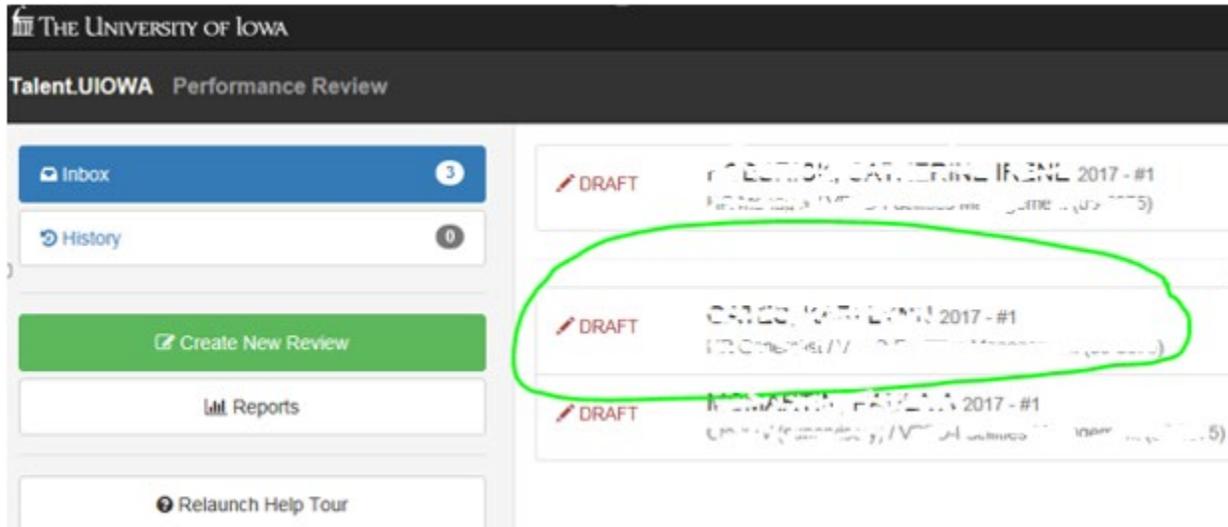
Scroll past the summary information at the top of the form to the Universal Competencies section. Note: as you progress through the form, there are red or green boxes in each section telling you whether that section requires entry.

The supervisor will see the employee's comments on each competency with a text box under each competency where they can enter supervisor comments. **Comments in each of these three text boxes is required.** Alternately, you can type "see attached" and address these areas in an attachment.
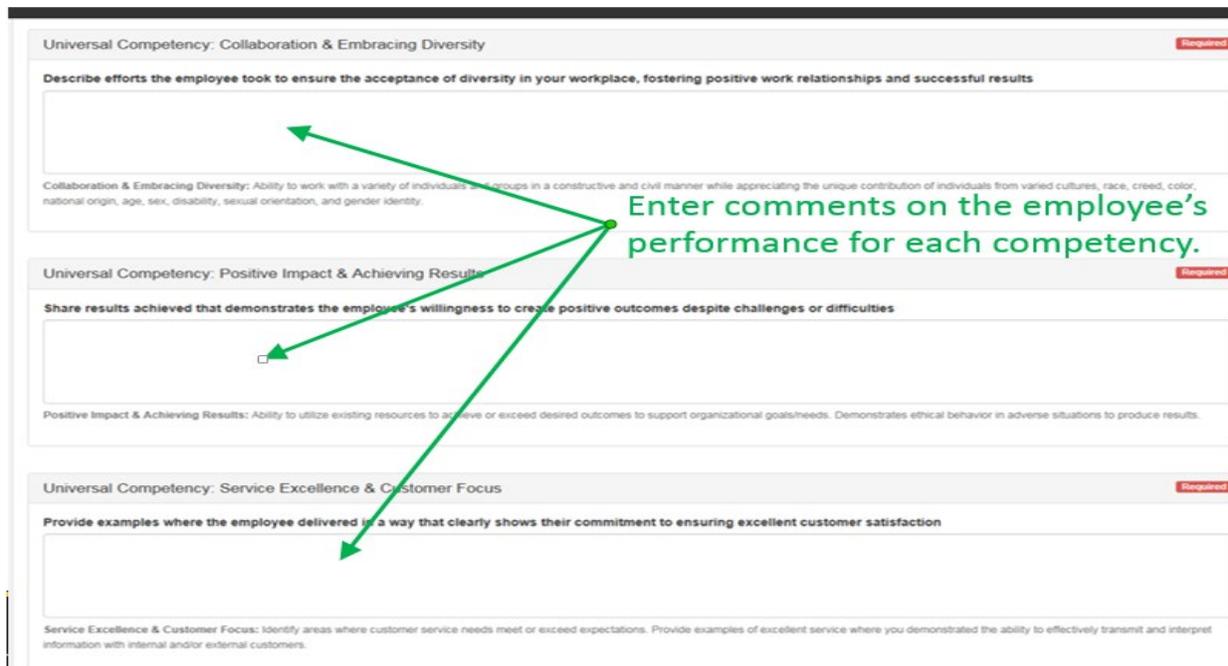
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Scroll down to the Employee Goals & Accomplishments section (optional). You will see any comments the employee provided about goal achievement.   Enter supervisor comments about the employee's achievement of any goals set for them in the text box or create an attachment that provides that information.

Write a summary of the employee's accomplishments & goal achievement during this performance period

Scroll down to the Supervisor Performance Review Documents section (optional). This is a place to attach other information about the employee's performance that is relevant to this review. Any documents that the employee attached during Step 1 will be listed here as well.

The supervisor can then decide if any of the attached documents should be added to the ePersonnel file (since they will not be part of the pdf of the review that gets attached in ePersonnel). The supervisor can also remove attachments if needed. Remember, it is optional to attach documents.

Scroll down to the Request Feedback section (optional). If the supervisor would like to have the system send an email requesting performance feedback from colleagues of the employee, they can click on the Request Some Feedback button and then fill out the boxes provided.

Supervisors have the ability to customize the email that is sent. Below is an example of a feedback request email. Responses to these feedback requests will appear in this section and the supervisor will have the option of making them visible to the employee if desired. Remember there are a myriad of ways outside of the performance review system to gather feedback about staff performance; supervisors are welcome to use whatever method they wish, if any.

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Feedback Email Preview   ✕

_____ _____ has requested your feedback regarding the work of _____ _____ as part of the annual performance evaluation process.

Please consider this employee's strengths as well as any opportunities for improvement.

After an initial review by the supervisor, your response may become part of the performance review.
Please indicate if you do not want your comments to be shared with the employee.

The supervisor has provided the following additional guidance:

(test)

Follow this link before (Thursday, 3 November 2016) to provide feedback (no login is required):

https://talenttrn.hr.uiowa.edu/performance/feedback/00000000-0000-0000-0000-000000000000

[Send Now] [Close]

Scroll down to Supervisor Comments. The Employee's additional comments will be visible here. **The supervisor is required to enter overall comments about the employee's performance in the text box.** Alternately, you can type "see attached" and provide overall comments in an attachment

Supervisor Comments   [Required]

Please provide your overall comments for this review

[   ]

Scroll down to Overall Rating. Enter the date of the review discussion between supervisor and employee will be discussing their review. **A reminder that CoE reviews must be completed no later than 10/22/21.**

Select a performance rating for the employee by clicking the appropriate radio button.   **The date and rating are required.**

Overall Rating   [Required]

Date of Performance Review   [   ] 🗓

Overall Employee Rating   ○ **Outstanding**
Employee considerably and consistently surpassed performance expectations and goals in all areas, made a significant contribution to the department's and/or University's success through unique and exceptional accomplishments; and excelled beyond their peer group. This rating is typically reserved for an extraordinary year, is seldom earned year after year.

○ **Exceeds Expectations**
Employee surpassed performance expectations and goals, demonstrated unique understanding of work well beyond job requirements.

○ **Successfully Meets Expectations**
Employee met job performance standards, was reliable in attaining expected results, and the employee is capable and knowledgeable of their work. Work was completed on schedule with a high degree of accuracy.

○ **Needs Improvement**
Employee has not satisfactorily completed the assigned duties in some areas and needs to demonstrate improvement toward meeting performance standards, work results were inconsistent.

○ **Unsatisfactory**
Employee has not met expected standards or goals set for the position, does not demonstrate knowledge or ability to perform the majority of assigned duties, must show immediate and significant improvement toward satisfactory achievement of performance standards in order to continue University employment.

Once you have completed your portion of the review, you are ready to discuss it with the employee and move on to Step 3 – Employee Acknowledgement (see below).

However, IF, after reading the employee's comments, you or the employee determine that they should make changes to their self-evaluation comments, you can return the review to the employee by clicking Return Review to Employee (white button).   The employee will only be able to see their own comments, not yours, but can make changes to the comments they originally provided.
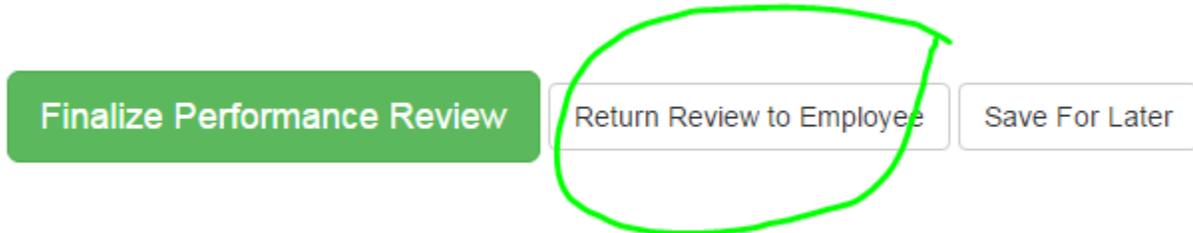
When the employee is are done making changes, they click on Submit (as before) to send the review form back to their supervisor.
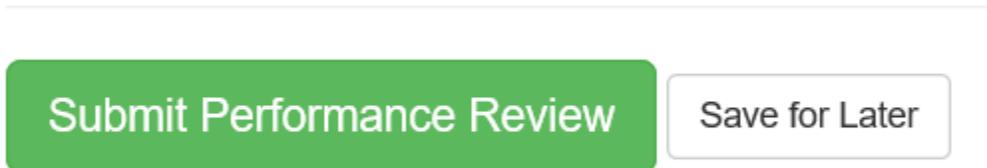
Once the review is complete (i.e both supervisor and employees comments are finished and no more changes are needed), the supervisor is ready to send it to the employee so he/she can read their comments and see the rating. It is a good idea to do this prior to the performance review discussion so the employee has a chance to read the full review ahead of time. Note there is a Print Review button in the left-hand menu if it is preferred to print a hard copy to give to the employee to read. Click Finalize Performance Review to send the review form (including both supervisor and employee comments) to the employee. This is the end of Step 2.
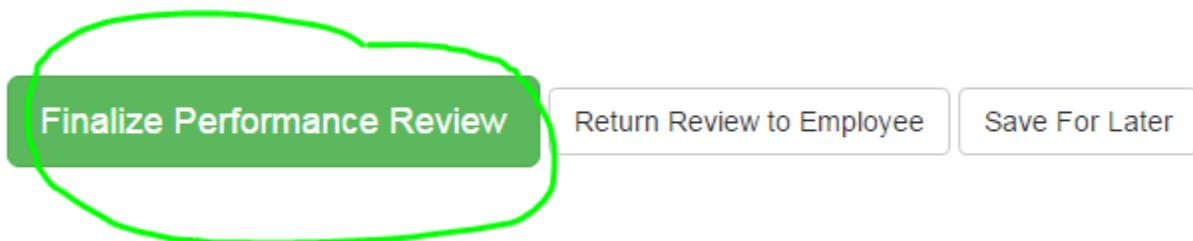
STEP 3 – Employee Acknowledgement. In this step, the employee reads the supervisors comments, sees the performance rating they have been given, and electronically signs the review. **Typically, the performance review discussion takes place immediately before or during this step.**
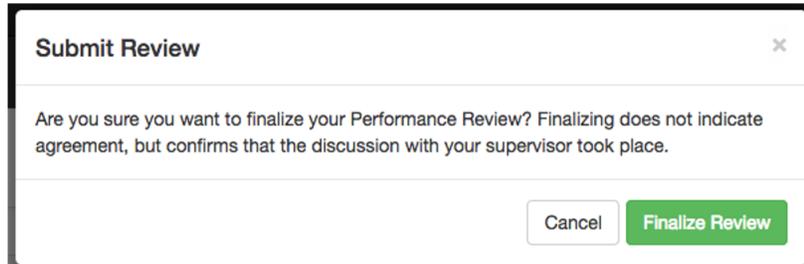
After the employee has read the full review and had the formal performance review discussion with their supervisor, the employee electronically signs the performance review by clicking Finalize Performance Review. Note that there is also a place to provide additional employee comments if you want to add anything in response to the review. These comments are optional. At the bottom of the form you will also see the workflow path and be able to click the Finalize Performance Review button to complete the process.

To avoid inadvertent submittal, a second confirmation will pop up. The employee should again click Finalize Review.

The system will then record the rating and date of completion and attach the review as a document within the employee's ePersonnel file.

The performance review process is now complete!

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HELPFUL HINTS

<u>No merging of supervisor and employee forms.</u>   Please note – the <u>employee</u> must initiate the review.   If a supervisor wants to get a head start on writing an employee's review it is recommended you do so in a Word document and then cut and paste into the review form once sent to you by the employee.

<u>No auto spell check</u>. There does not appear to be spell check functionality in the tool. Please take care when typing your comments and be sure to proofread. Alternately, you may wish to type your comments in a Word document first where they can be spellchecked, and then cut and paste the comments into the review form.

<u>Navigation menu</u>. Within the review tool, there is a menu on the left side you can use to quickly jump to each section.

Review Summary
Universal Competencies
Goals & Accomplishments
Performance Documents
Request Feedback
Review Comments
Overall Rating

<u>Notifications.</u> When a review form is sent to you (i.e. employee submits to supervisor, supervisor sends to employee for signature), the system will send you an email notification. You can then log in to Employee Self Service → Personal → Performance Review to access the form, which will appear in your workflow inbox.

<u>Reports.</u> Supervisor will have a link on the left side of their Inbox called Reports. This will allow you to see the status of your direct reports' reviews.

🖾 Inbox	3
🕘 History	0
🖉 Create New Review	
📊 Reports	
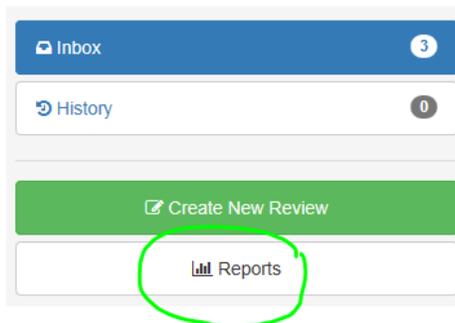
Questions? Contact Cathy Koebrick (cathy-koebrick@uiowa.edu) or Katie Voss (katherine-voss@uiowa.edu).