Step-by-Step Guide to Online Performance Management Tool for Managers
Performance Management User Guide
Manager’s Edition: Completing the Year-End Review

To complete the Year-End Review, you should review your notes on your employee, the Mid-Year Review, the employee’s self-evaluation, and if the employee has direct reports, you should consider the upward feedback provided. This section of the instructions will show you how to review the self evaluation, and upward feedback. It will finish by showing you the steps to completing the Year-End Review.

For questions or concerns please contact Learning and Organizational Development at x77844.
1) Begin by going to the Human Resources page and selecting “Self-Service Login.”

2) Type in your user name (Network ID) and password.
3) Click on the dropdown menu labeled “Workforce Administration.”

4) Select “Manager Self Service.”
5) Click on the “Performance Management” Tile.

6) Click on the name of the employee for whom you would like to complete the Year-End Review.
7) Click on the “Review Self Evaluation” drop down icon.

8) Click on “View.”
9) You will be able to see your employees self evaluation. If you cannot see the information, your employee has not shared the information with you. You can navigate the feedback by selecting the competencies, goals of responsibilities tabs, and by clicking on the drop down icons under each tab.
10) We will now begin how to review Upward Feedback. If your employee does not have any direct reports, please skip to step 15.

11) Click on the dropdown icon for the “Review Performance Feedback” section.

12) Click on “View.”
13) To view each direct report’s feedback of your employee, click on their names. This will launch a separate window with the feedback. Make sure your popup blocker is off.

14) You can navigate the feedback with the dropdown icons.
15) After taking into consideration your employee’s feedback, and that of their direct reports if applicable, you are ready to fill out your Year-End evaluation.

To do this, click on the “Complete Year-End Review” drop down icon.

16) Here you can use the tabs to navigate between the Competencies, Goals, and Responsibility tabs to provide your input. For competencies, you will need to select a rating between 1 and 5. To review the rating scale and behaviors for each competency, use the “Click here” and “Rating Description” links.
17) Complete the comments box for each of the competencies. If you have goals and responsibilities, complete those comments as well. You must provide at least 100 characters for any rating of a 1, 2 or 5.

18) Don’t forget the “What” and “How” summary sections, which also require comments. You may override the suggested rating for each section by clicking the “Final Rating” link, which will provide you a drop down box to select the rating you feel is most appropriate.
19) If your employee has direct reports, and you received upward feedback, you may review any feedback provided in the upward feedback section mentioned earlier in step 10. You may use the tab shown below to summarize the upward feedback provided. Remember to use this information only in combination with your own observations. Do not share the comments verbatim.

20) If the employee had goals or responsibilities, make sure to review those as well and provide an overall assessment of how well they did on those goals and/or responsibilities. Finally, you will want to provide an overall assessment for your employee. This is where you give the overall assessment of their performance. Click on the “Overall” tab.
21) You will want to select a rating, and write a summary of your reasoning and thoughts on their performance. You may override the suggested rating by clicking the “Final Rating” link, which will provide you a drop down box to select the rating you feel is most appropriate.

22) Save by clicking on the “Save” button. When you are comfortable with your evaluation, you are ready to perform a meeting with your employee to discuss their Year-End Review. This meeting should be similar to the Mid-Year Review.
23) After you complete your Year-End Review in person with your employee, return to the document and click on “Review Occurred.”

24) You will be asked to confirm this step. Select “Confirm.”
25) You will receive the confirmation screen. This documents your meeting and sends the document to your employee. The employee will have the opportunity to make comments and acknowledge the review.

26) Once your employee acknowledges the review, you will want to complete and close the Year-End performance evaluation. You will be able to respond to their comments.
27) When you are finished, click on “Complete”

28) You will be asked to confirm. Click on “Confirm.”
29) You will receive confirmation you completed the Year-End Review. Congratulations! You have completed a full Performance Review Cycle.