ePerformance: Tips to Help Complete your Employee’s Annual Review

Before You Start

Goals must be set to Complete before starting the annual review process.

The employee’s document will default to Set Goals.

Click **Complete** on the top-right of the page, then click **Confirm**.

Review Manager: Completing the Goal Setting Document Quick Start Guide.

Select Reviewers for Feedback

You and your employee can nominate reviewers, but only you submit the feedback requests.

*Note: Feedback is returned to you, not the employee.*

On the left-side Work Center, click **Add Reviewers** (or **Add and Submit**). After adding/removing the reviewers, click **Submit Reviewers**, then **Confirm**.

Review Manager: Completing the Annual Review work instruction.

Review Feedback

Two methods:

- From the Work Center - Click **View** under Review Self Evaluation or Read Reviews.
- Within the Mgr’s Evaluation - Both employee and other reviewer comments will appear under all applicable **Employee Comments** or **Reviewer Feedback** sections.

Review Manager: Completing the Annual Review work instruction.

Incorporate Feedback (optional)

Use the Writing Tools feature to add reviewer feedback or your notes.

Click **Writing Tools** in the Manager’s Document in the section you are working on.

Select from the **Suggested Results**, then **Add to Comments**.

Make any additional comments, then click **Save and Return**.

Review Manager: Completing the Annual Review work instruction.

Assign Ratings

All ratings (Job and Performance Goals, Competencies, and the Overall Rating) are required in the Manager’s Evaluation.

Review the ratings description for each section by clicking the calendar icon. The ratings description is more accurate than the number.

*Note: For the Overall Rating, select the rating that best reflects the employee’s overall performance for the year.*

Review Manager: Completing the Annual Review work instruction.
Share / Meet with Employee

You can meet with the employee to discuss the annual review before or after you click Share w/ Employee on the Manager’s Evaluation. Follow the guidelines for your school/unit.

Note: The face-to-face meeting is a critical component of the Annual Review process.

Acknowledges

You can acknowledge the document if your employee cannot or will not acknowledge it.

- Click Override Acknowledge in the Manager’s Evaluation.

Select a reason, then click Confirm. This completes the process.

View Documents

View documents of direct and indirect reports for whom you are not completing annual reviews – Click the View Only Documents page from the Team Performance tile.

View completed and canceled documents of employees for whom you did complete reviews – Click the Historical Documents page from the Team Performance tile.

Review Manager: Completing the Annual Review work instruction.

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Review Team View-Only Documents and Team Historical Documents work instructions.