Online Annual Review Process

What is the TC Review Process?
- The TC Annual Review Process is for Full-Time Professional Staff at the College
- All Full-Time Professional Staff should participate
- The process consists of:

<table>
<thead>
<tr>
<th>Stage</th>
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</tr>
</thead>
<tbody>
<tr>
<td>1 Employee Suggested Review</td>
<td>Planning</td>
</tr>
<tr>
<td>2 Supervisor finalization of goals</td>
<td>Progress</td>
</tr>
<tr>
<td>3 Journal</td>
<td>Progress</td>
</tr>
<tr>
<td>4 Mid-Year Check In</td>
<td>Check-In</td>
</tr>
<tr>
<td>5 Journal</td>
<td>Progress</td>
</tr>
<tr>
<td>6 End of Year Final Review - Employee</td>
<td>Self-Review</td>
</tr>
<tr>
<td>7 End of Year Final Review - Supervisor</td>
<td>Manager Review</td>
</tr>
<tr>
<td>8 Employee Confirmation</td>
<td>Complete</td>
</tr>
<tr>
<td>9 Complete</td>
<td>Complete</td>
</tr>
</tbody>
</table>
Stage 1 - Employee Suggested Review

This is the start of the performance review process. This is the planning stage.

The employee will receive an email to begin the process. During the step, the employee will meet with their supervisor to set and agree on goals for the year. This can be accomplished in at least two ways. The employee can complete the first stage of the review and provide it to their supervisor. Alternatively, the employee and supervisor can meet to discuss annual goals and complete the form together.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
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<tbody>
<tr>
<td><strong>STEP 1:</strong> How to access the Performance Module</td>
<td>![Image of myTC interface]</td>
</tr>
<tr>
<td>Log into myTC and select TC Services.</td>
<td></td>
</tr>
</tbody>
</table>

| **STEP 2:** | |
| Once you have selected the ‘TC Services’ tab you will navigate to the ‘Payroll and Human Resources’ box and click the ‘Performance Management (NEW)’ link | ![Image of myTC interface] |
STEP 3:
This is the Performance Module home page.

From the ‘My Performance Reviews’ box, select Performance Review 2018 – 19.

STEP 4:
You will be taken to the start of your performance review.

Notice the tabs on the top – these will show the step in the process.

You can navigate between tabs by clicking each tab or hitting Next → in the bottom right.
**STEP 5:**
**Goals & Objectives**

Employee suggests up to five goals/objectives for the year

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**STEP 5 (continued):**

**Complete the Title, Description and Target date for each goal/objective identified**

List any areas of strength that you would like to specifically

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**STEP 5a:**

If needed, click ‘Add Goal’ for additional goals

Or, click ‘Next’ to move to the next tab once all goals have been added
STEP 6: 
Areas of Strength (Optional)

List any areas of strength that you would like to specifically note. As with Goals, you can add more, or move to the next stage, via buttons at the bottom of the page.

Click ‘Next→’ to move to the next tab once all areas of strength have been added.

STEP 7: 
Development Plan

This page ties directly into your annual goals. Here, list any development you will need to help accomplish the goals set out.

Click ‘Next→’ to move to the next tab once all items for development have been added.
**STEP 8:**

**Next Steps**

Review the form at this step. You are able to navigate through each of the tabs if you would like to revise anything.

Click ‘Go to the next step’ to move review to the next stage.
# Stage 2 - Supervisor Finalization of Goals

This continues the planning stage of the process.

During this stage, the supervisor will be asked to review and confirm the employee’s duties, goals and development plan for the year.

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</tr>
<tr>
<td><strong>STEP 2:</strong></td>
<td></td>
</tr>
<tr>
<td>Once you have selected the ‘TC Services’ tab you will navigate to the ‘Payroll and Human Resources’ box and click the ‘Performance Management (NEW)’ link</td>
<td><img src="image" alt="Diagram" /></td>
</tr>
</tbody>
</table>
STEP 3: This is your Performance Module home page.

Choose the performance review for the applicable employee

- Navigate to the ‘Team Performance Reviews’ section
- Select ‘Performance Review 2018 -19’ for the employee

STEP 4: You will be taken to the start of your performance review

Notice the tabs on the top – these will show the step in the process.

You can navigate between tabs by clicking each tab or hitting Next ➔ in the bottom right
STEP 5: Goals & Objectives

Employee suggests up to five goals/objectives for the year. Edit or add as you see fit.

STEP 5 (continued):

Complete the Title, Description and Target date for each goal/objective identified.

Click Add Goal as necessary.

Click ‘Next’ to move to the next tab once all goals have been added.

STEP 6: Areas of Strength (Optional)

Employee will have listed any areas of strength. Add or amend as you see fit.

As with Goals, you can add more, or move to the next stage, via buttons at the bottom of the page.
Click ‘Next’ to move to the next tab once all areas of strength have been added

STEP 7: Development Plan

This page ties directly into the previous tab where goals and objectives were identified. Here, list any development you would like the employee to accomplish the goals set out.

Click ‘Next’ to move to the next tab once all items for development have been added

STEP 8: Next Steps

This tab will display a summary of all inputted information. Review. Move back through tabs if you need to make any edits.

Once review is complete, click ‘Go to next step’ to move performance review to the next stage – Journal.
**Cascading Goals - Supervisors**

**This is NOT an official step in the performance review process, but an available option for supervisors** After supervisors have received their own goals and objectives for the year, they are able to cascade them down to members of their team.

<table>
<thead>
<tr>
<th>What you need to do</th>
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</tr>
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<tbody>
<tr>
<td><strong>STEP 1:</strong> From performance module splash</td>
<td><img src="image" alt="Organizational Chart" /></td>
</tr>
<tr>
<td>Hover over the ‘My team’ on the top left and click ‘Organizational Chart’</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 2:</strong></td>
<td><img src="image" alt="My team" /></td>
</tr>
<tr>
<td>Click your own name on the organizational chart</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 3:</strong></td>
<td><img src="image" alt="Performance" /></td>
</tr>
<tr>
<td>Click the Performance header. Locate your current review. From the ‘I want’ drop down menu, choose ‘Cascade Objectives’</td>
<td></td>
</tr>
</tbody>
</table>
STEP 4:
You will be presented with a listing of your goals and your team members

STEP 5:
Choose the radio button(s) for the applicable goal(s) and team member, and click ‘Next’
**STEP 6:**
On the next page, confirm the goal/team member combination and click ‘Next’

**STEP 7:**
Your goals have now been cascaded to the appropriate team member
Click ‘Close’
Stage 3 – Journal (Optional)

This is the progress stage of the review process.

Our performance platform provides allows employees to help track performance targets by adding a recordkeeping/journal functionality that allows employees to save any notable emails/conversations etc. through the journal stage. (Please note that your supervisor will only be able to see journal entries that you link to your performance review. This will be done during Stage 6 – End of the Year Final Review – Employee.)

<table>
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<tr>
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<tbody>
<tr>
<td><strong>STEP 1. Manual Entry</strong></td>
<td><img src="image" alt="Add Journal Entry Pop-up" /></td>
</tr>
<tr>
<td>From your performance module home page, select ‘Journal entry’ in the top right corner.</td>
<td></td>
</tr>
<tr>
<td>You will be prompted with an ‘Add journal entry’ pop up box.</td>
<td></td>
</tr>
<tr>
<td>Manually input your entry and click ‘Add’</td>
<td></td>
</tr>
</tbody>
</table>
### STEP 2. Forward email via mail matcher functionality

If you receive feedback via email that you would like to attach to part of your performance review goals, you can forward the email via mail matcher.

- From performance module home page, navigate to your profile in the top right corner. Click the drop down arrow next to your name, click profile.
- Make note of your my journal mail matcher email address.

### Send email to performance journal.

- Go to email with feedback.
- Select ‘FWD’ functionality.
- Address email to your mail matcher email.
- In body of email input [journal] – this will instruct PageUp to attach it to your journal

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**Stage 4 - Mid-Year Check-In (Optional)**
This is an optional stage to review goals and determine if the goals established in the beginning of the year remain the priority. Only the supervisor can change goals at this stage. **Navigate through each tab as you did in stages 1 and 2.**

**Stage 5 – Journal**

Employees are allowed to journal again and to save and track progress towards performance goals. **See Stage 3 for instructions on how to journal**
You are now entering the self-review stage of the process. After receiving an email that announces this stage, employees can log in and start their self-review. Employees can add comments, link journal entries or upload documentation for support. They must also rate themselves against each item.

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<tr>
<td><strong>STEP 1:</strong> Access your review via the performance module.</td>
<td><img src="image" alt="Welcome Emma, you are logged in" /></td>
</tr>
<tr>
<td>You will be taken to the tabular view again. Navigate through each tab and each item in the tab. You will not be able to EDIT any text. You will only be able to ‘add comments’ or link journal entries against each entry (job duty, goal, development plan etc.)</td>
<td><img src="image" alt="Emma Employee - Performance Review 2018 - 19" /></td>
</tr>
</tbody>
</table>
STEP 2: To Add comment:

- Click Add comment
- Enter text
- You have two options:
  - Click Save & Share to publish for viewing by supervisor, OR
  - Click Save as Private to save text to only be seen by you. When ready to publish, click Save & Share.

STEP 3: To Link journal entry or upload file.

- Click the drop down menu next to ‘Add comment’
- Select ‘link journal entry’
- A listing of journal entries that you have sent will populate
- Select the applicable entry and click ‘Link’
STEP 4: Rate yourself against each item.

You will see a sliding scale. Move the marker as you see fit (does not meet goal, meets goal, exceeds goal)

Comment and rate as applicable throughout each tab.
STEP 5: Next steps tab

You are able to add your final comments against your performance review as a whole. Once you have inputted this, click 'go on to the next steps.'
Stage 7 – End of the Year Final Review – Supervisor

In this stage, the supervisor reviews the goals and comments against each goal as supplied by the employee. The supervisor can then add their own comments and rates each item.

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### STEP 3:
This is your Performance Module home page.

Choose the performance review for the applicable employee:

- Navigate to the ‘Team Performance Reviews’ section
- Select ‘Performance Review 2018-19’ for the employee

You will be taken to the tabular view again. Navigate through each tab and each item in the tab. You will not be able to EDIT any text. You will only be able to ‘add comments’ or link journal entries against each entry (job duty, goal, development plan etc.)

### STEP 2: To Add comment:
- Click Add comment
- Enter text
- You have two options:
  - Click Save & Share to publish for viewing by supervisor, OR
  - Click Save as Private to save text to only be seen by you. When ready to publish, click Save & Share.
**STEP 3: To Link journal entry or upload file.**

- Click the drop down menu next to ‘Add comment’
- Select ‘link journal entry’
- A listing of journal entries that you have sent will populate
- Select the applicable entry and click ‘Link’
You will then see the journal entry text linked to your performance review.

**STEP 4: Rate Employee against each item.**

On the applicable tabs, you will see a sliding scale. Move the marker as you see fit (does not meet goal, meets goal, exceeds goal).

Comment and rate as applicable throughout each tab.

- Network Opportunities
  - Current
  
  Attend conferences or other networking sessions to learn best practices from similar organizations and industry trends.

  **Target date:** 30 Apr 2018

  ![Add comment]

  ![Journal Linked by name]

  **Johanna Masbad**
  **Fwd: Teacher's College Discovery Call (Dial-In 712.770.8028; Conference Code 281430)**
  Subject: Fwd: Teacher's College Discovery Call (Dial-In 712.770.8028, Conference Code 281430)

  "Hannah Masbad"
  Sr. HRIS Analyst
  TEACHERS COLLEGE | COLUMBIA UNIVERSITY
  Phone: 212-678-3251
### STEP 5: Next steps tab

You will be alerted of any items that you may have forgotten to rate.

#### 

<table>
<thead>
<tr>
<th>Cannot progress the review to the next step</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Manager rating missing for &quot;Formal Learning&quot; under section &quot;Goals &amp; Objectives&quot;</td>
</tr>
</tbody>
</table>

### STEP 5: Next steps (continued):

Use the rating slider to rate the employee for the overall review. This rating will be displayed to the employee.

#### 

![Rating slider image]

Your overall rating is based on the ratings your Supervisor gave you.

#### 

![Final comments image]

Final comments:

<table>
<thead>
<tr>
<th>Jason Jones</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hannah is</td>
</tr>
</tbody>
</table>

### STEP 5: Next steps (continued)

You are also able to review the employee’s final comments and write your own.

Once review is complete, click ‘Go to next step’ to move performance review to the final step – Employee Confirmation.
Stage 8 – Employee Confirmation

This is the final stage in the process:

In this stage, the employee is able to review all final comments on each item throughout each of the tabs.

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[Image of myTC interface and navigation steps]
**STEP 3:**
This is your Performance Module home page.

From the ‘My Performance Reviews’ box, select *Performance Review 2018 – 19*.

You will be taken to the tabular view again. Navigate through each tab and each item in the tab.

You will only be able to view your manager’s comments throughout your review.

**STEP 4 (optional): Print Performance Review Progress Report**

Navigate to the ‘Actions’ menu on the right side.

Select ‘View progress report’
Your performance review will be reformatted to a printer-friendly version. You can hit the icon, to print it.

**STEP 5: Final confirmation**

Select ‘Go on to next step’ to move the performance review to Complete.

You have now completed your performance review!
Appendix A: Full Cycle Diagram

1. Employee Suggested Review
2. Supervisor finalization of goals
3. Journal
4. Mid Year Check In
5. Journal
6. End of Year Final Review – Employee
7. End of Year Final Review – Supervisor
8. Employee Confirmation
9. Complete