Performance Review Manual

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

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>
</thead>
<tbody>
<tr>
<td><strong>STEP 1:</strong> How to access the Performance Module</td>
<td>[Image of myTC interface showing how to access Employee Resources]</td>
</tr>
<tr>
<td>Log into myTC and select Employee Resources.</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 2:</strong> Navigate to the Payroll and Human Resources section and click the Performance Management link</td>
<td>[Image of myTC interface showing how to access Payroll and Human Resources]</td>
</tr>
</tbody>
</table>
**STEP 3:**
This is the Performance Module home page.

From the My Performance Reviews box, select Performance Review 20YY – YY. (Select the current year)

**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:**
Job Responsibilities

This will pull over from your Job Description in the Recruitment Dashboard. Please review and click Next.

If this tab does not populate for you, it means your job description needs to be updated. Please contact your HR Services representative.

**STEP 6:**
Goals & Objectives

Employee suggests up to five goals/objectives for the year
STEP 6 (continued):

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

List any areas of strength that you would like to specifically.

STEP 6a:

If needed, click **Add Goal**. Or, click **Next** to move to the next tab once all goals have been added.

STEP 7: 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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<td><img src="image" alt="myTC Performance Module" /></td>
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<tr>
<td>Log into myTC and select Employee Resources.</td>
<td>Welcome to Teachers College Columbia University. MyTC Employee Resources section is highlighted.</td>
</tr>
</tbody>
</table>

[Image: Planning, Progress, Check-in, Progress, Self Review, Manager Review, Complete]
STEP 2:
Navigate to the Payroll and Human Resources section and click the Performance Management link.

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 20YY-YY (*should reflect the current year) 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:**
Job Responsibilities

This will pull over from your Job Description in the Recruitment Dashboard. Please review and click Next.

If this tab does not populate for the employee, it means the job description needs to be updated. Please contact your HR Services representative.

**STEP 6:**
Goals & Objectives

Employee suggests up to five goals/objectives for the year. Edit or add as you see fit.
STEP 6 (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 7:
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 8: 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 9: 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>
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| **STEP 1:** Go to the Performance Module home page  
Hover over the ‘My team’ on the top left and click ‘Organizational Chart’ | ![Organizational Chart](image1.png) |
| **STEP 2:** Click your own name on the organizational chart | ![My Team](image2.png) |
| **STEP 3:** Click the Performance header.  
Locate your current review. Under Status find Current. From the ‘I want’ drop down menu, choose Cascade Objectives | ![Performance](image3.png) |
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.)

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<tbody>
<tr>
<td><strong>STEP 1. Manual Entry</strong></td>
<td><img src="image" alt="Journal Entry Interface" /></td>
</tr>
<tr>
<td>From your performance module home page, select <strong>Journal entry</strong> in the top right corner.</td>
<td><img src="image" alt="Add Journal Entry Pop-up" /></td>
</tr>
<tr>
<td>You will be prompted with an Add journal entry pop up box.</td>
<td><img src="image" alt="Add Journal Entry Form" /></td>
</tr>
<tr>
<td>Manually input your entry and click Add</td>
<td><img src="image" alt="Add Entry Confirmation" /></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*
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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<td><strong>STEP 1:</strong> Access your review via the performance module.</td>
<td><img src="image1" alt="Welcome Emma, you are logged in" /></td>
</tr>
</tbody>
</table>

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 your journal entry text linked to your performance review.

Network Opportunities

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

Target date: 30 Apr 2018

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 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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<td><img src="image" alt="myTC Interface" /></td>
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<tr>
<td>Log into myTC and select TC Services.</td>
<td><strong>STEP 2:</strong> Navigate to the Payroll and Human Resources section and click the Performance Management link</td>
</tr>
</tbody>
</table>

**What you need to do:**

1. **Log into myTC and select TC Services.**

**What you will see:**

- myTC interface with highlighted Employee Resources and Performance Management link.

- Payroll and Human Resources section with Performance Management link.
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.

Target date: 30 Apr 2018

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.
### STEP 5: Next steps tab

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

![Image of warning message](image)

- Cannot progress the review to the next step
  - Manager rating missing for "Formal Learning" under section "Goals & Objectives"  

### 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.

![Image of rating slider](image)

**Supervisor Overall Rating**

- **Exceeds**
  - 45/50

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

**Goals progress**

- **Overall review**
  - 45/50

**Save**

### STEP 5: Next steps (continued)

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

![Image of final comments](image)

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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<td><img src="image-url" alt="myTC Dashboard" /></td>
</tr>
<tr>
<td>Log into myTC and select Employee Resources.</td>
<td></td>
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</table>
**STEP 2:**

Navigate to the Payroll and Human Resources section and click the Performance Management link.

**STEP 3:**

This is your Performance Module home page.

From the My Performance Reviews box, the most current performance review.

You will be taken to the tabular view again of your performance review. You can review manager’s comments throughout each section.
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!