Performance Review

A Guide to Navigating the Performance Review Process
Performance Management Cycle

Goal Setting and Planning

- End Year Review
- Feedback and Check-Ins
- Mid Year Review
- Feedback and Check-Ins
# Performance Management Timeline

<table>
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<tr>
<th>#</th>
<th>Description</th>
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Getting Started

Log into myTC and select **Employee Resources**.

Navigate to the **Human Resources section** and click the **Performance Management link**.
Home Screen Continued – Employee View
Home Screen Continued – Employee View
Home Screen Continued – Supervisor View

- My team
  - Organizational chart
  - Team details
  - Recruitment
  - Performance reviews

My team

Sr. HRIS Analyst
Position: Sr. HRIS Analyst
Incumbent: Johanna Masbad

HRIS Analyst I
Employee: Ann Garg
Performance: Journal Open review
View profile View details Create requisition from a job description
Home Screen Continued – Supervisor View

Welcome to the Supervisor View in the [Company Name].

- **My team** dropdown menu:
  - Organizational chart
  - Team details
  - Recruitment
  - Performance reviews

- **My team performance reviews** section:
  - Employee first name:
  - Level: All
  - Review process step: Select
  - Employee last name:
  - Status: Current
  - Role:

<table>
<thead>
<tr>
<th>Employee</th>
<th>Review process</th>
<th>Review step</th>
<th>Role</th>
<th>Start date</th>
<th>Due date</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emma</td>
<td>Performance Review 2019 - 2020</td>
<td>Employee Confirmation</td>
<td>Professional staff</td>
<td>24 Sep 2019</td>
<td>13 Sep 2020</td>
<td>I want to...</td>
</tr>
<tr>
<td>Emma</td>
<td>Performance Review 2019 - 2020</td>
<td>Employee Confirmation</td>
<td>Professional staff</td>
<td>14 Oct 2019</td>
<td>14 Oct 2020</td>
<td>I want to...</td>
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Please refresh the page to see performance reviews that you have just taken ownership.

- Open review button for each employee review.

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1/6/21
### Step 1: Employee Suggested Goals

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Hi Johanna,

Welcome to your new Performance Review. During this step you will meet with your supervisor to set and agree on your goals for the year. This can be accomplished in at least two ways. You can use this to provide suggestions to your supervisor prior to a meeting OR you and your supervisor can meet to discuss annual goals and complete the form together. Please check with your supervisor on the preferred course to initiate this review cycle. For a step by step guide, please refer to the Performance Review Manual.
Click through each tab to take you through different sections of the performance review.

This will instruct you on what to do in that section.
This pulls from the Job Duties listed on the Job Description

Click when you’re ready to move to the next section
Goals & Objectives

Hannah Masbad - Performance Review 2020 - 2021

Goals & Objectives
Areas of Strength (Optional) Development Plan Next steps

Employee:
At the Employee Suggested Review stage, suggest goals for the upcoming year. Then, for the remainder of the year, regularly review and comment on your progress.
Describe the progress made during this year toward the three to five goals and objectives identified for review during this period.
Please note, your Supervisor can cascade their goals within your performance review. These will appear at the top.

Supervisor:
You can comment against each Goal and Objective. Throughout the year you can comment on their progress and add relevant journal items throughout the year.
## Inputting Goals

<table>
<thead>
<tr>
<th>Item title</th>
<th><strong>Title</strong></th>
<th>Test Goal #1</th>
</tr>
</thead>
</table>

**Description**

- write a description of the goal here.

**Status**

- **Status**: Current
- **Target date**: 23 Oct 2021
- **Attachment**: Upload document

**Status options**

- Current
- Completed
- No longer achievable
- Cancelled
Areas of Strength (Optional)

Employee:
Identify any skill or knowledge area which you would like to note as a strength and/or something that can be further leveraged over the course of the next year. Please be as specific as possible. Each strength should be its own entry and you should identify as many as possible.

Please note: this section is non-mandatory and does contribute to your overall performance outcome.

Supervisor:
Add any relevant strengths to your employee's review. You can comment on their progress throughout the review.

Item title
Title: List your areas of strength
Development Plan

Employee

Propose at least one development goal for the next appraisal period, where job-related skills can be enhanced.

Access lynda.com to view a wide range of applicable online tutorials and courses.

Supervisor

Please review your employee’s identified areas of development.

The Development Plan ensures that you receive the appropriate development and support to meet your goals for both your current role and future career development path.

Your Development Plan should be simple and achievable. To assist in determining your development needs, give consideration to the following priorities:

- Which skills, knowledge and experience do you most need to develop in your current role to improve your performance?
- Which skills, knowledge and experience do you need to develop to ensure you achieve the coming year’s goals?
- Note: Don’t forget to provide a description of the activity and the date to be completed.
Next steps

1. Auditing - Assist HRIS Coordinator in analyzing and...
2. Assisting HRIS Coordinator with troubleshooting and...
3. PageUp End User Support - Provide support for HRMS,...
4. Reporting (PageUp related) - Write, maintain and support...
5. Disability & Leave - In conjunction with the Benefits...
6. Instructional Documentation - Develop user procedures,...
7. Taxable Tuition - Determine tax liability for all...
8. Unemployment - Process unemployment claims in a timely...
9. Other duties as assigned
Next steps (continued)

The next step of the Performance Review

Your next step: Supervisor Finalization of Goals

Clicking "Go to next step" will move this review to the next step and you will be unable to return to this step.

Go to next step

View entire process
### Step 2: Supervisor Finalization of Goals

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Step 2: Supervisor Finalization of Goals

Click through each tab to review what your employee input in each of the different sections.

Hi Johanna,

During this step you will meet with your employee to set and agree their goals for the year. This can be accomplished in at least two ways. You can use this form to provide suggestions to your supervisor prior to a meeting OR you and your supervisor can meet to discuss annual goals and complete the form together. Confirm with your employee on the preferred course to initiate this review cycle. Please click the Performance Review Manual for further instructions.
Step 2: Supervisor Finalization of Goals

As a supervisor, you will be able to review all the goals and development plan items that the employee suggests for themselves. You can make updates as needed.
Next steps (continued)

Your next step: Journal

- Clicking "Go to next step" will move this review to the next step and you will be unable to return to this step.

Go to next step

View entire process
### Step 3: Mid – Year Check In

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Hi Emma,

During this step you will meet with your supervisor for a mid year check in on your performance goals.
Mid Year Check In

- Review Each Section
- Add Comments as needed
- View any linked journal entries
- Cannot delete goals at this time
  - Recommend to write a comment if no longer applicable
- Can add new goals/items
## Step 4: End of Year Final Review - Employee

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Step 4: End of Year Final Review - Employee

Hi Emma,

During this step you will review and add your final comments. Once you click 'Next', your Supervisor will rate your Annual performance.

Upon your acknowledgment, your performance assessment will be complete.

Employee should review each section. You can add your comments against each item in each section.
In the Goals & Objectives section, you will need to rate yourself on each goal & objective.
Step 4: End of Year Final Review - Employee

Next steps

Final comments
Emma Employee

Your next step: End of Year Final Review - Supervisor

Clicking “Go to next step” will move this review to the next step and you will be unable to return to this step.

Go to next step
## Step 5: End of Year Final Review - Supervisor

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Supervisor should review each section. You can add the final comments that your employee input and also add your own comments against each item in each section.
End of Year Final Review - Supervisor

- Cannot Rate
- Can add comments
You will see what the rating the employee has given themselves for each goal.

You will add your own rating for them against each goal.

You can also add comments as needed.
Continue to review each section and add comments as needed.
This averages out all the ratings in the Goals & Objectives section.

You will be able to rate the employee one last time.
End of Year Final Review - Supervisor

You will be able to read the employee’s final comments.

You will be able to write your own final comments for the employee.

You will move the review to the final stage: Employee Confirmation.
Step 6: Employee Confirmation

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Employee Confirmation

You can review the final comments of your supervisor.

On the Next steps tab, be sure to click Go to next step to complete the review process for the year.
Viewing Completed Performance Reviews

In the About me tab, click the Performance review link

You will see all of your performance reviews

Change the status to COMPLETE and click Search
## Printing Completed Performance Reviews

### My performance reviews

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<thead>
<tr>
<th>Review process</th>
<th>Review step</th>
<th>Manager</th>
<th>Role</th>
<th>Start date</th>
<th>Due date</th>
<th>I want to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performance Review</td>
<td>Complete</td>
<td>Andrew Manager</td>
<td>Professional staff</td>
<td>13 Sep 2019</td>
<td>30 Sep 2019</td>
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<tr>
<td>Performance Review</td>
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<td>Johanna Masbad</td>
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<tr>
<td>2020 - 2021</td>
<td>Complete</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>View the report</td>
</tr>
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- View the report
- View progress report
- View the review process
Emma Employee - Performance Review 2019 - 2020

Role: Professional staff  Manager: Hannah Masbad
Step: Complete

20 November 2020

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

3.9 / 5.0

Is doing an excellent job and usually exceeds most requirements; Demonstrates a willingness to perform beyond expectations; Goal or objective completed in a manner that was beyond what was expected

<table>
<thead>
<tr>
<th>Job Responsibilities</th>
<th>Your score</th>
<th>Maximum</th>
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<tbody>
<tr>
<td>Auditing - Assist HRIS Coordinator in analyzing and...</td>
<td>-</td>
<td>-</td>
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