Intro to Performance Module

A Guide to Navigating the Performance Module
What We’ll Cover Today

- Performance Management Cycle
- Performance Management Timeline
- How to Access
- Performance Module Home Page
- Detailed Walk Through Each Step
- Other
  - Printing Completed Reviews
  - Cascading Goals as a Supervisor
Performance Management Cycle

Goal Setting and Planning

End Year Review

Feedback and Check-Ins

Feedback and Check-Ins

Mid Year Review
## Performance Management Timeline

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How to Access

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

Navigate to the **Human Resources section** and click the **Performance Management link**.
Performance Module Home Page

Welcome Hannah, you are logged in

My Performance Reviews
- Performance Review 2020
  - Current step: Employee Suggested Goals

Performance Review 2019 - 2020
  - Current step: End of Year Final Review - Supervisor

Recruitment
- Administration

Team Performance Reviews
- Action Required
  - There are 2 performance reviews not assigned to you: Show me

Emma Employee
- Performance Review 2019 - 2020 (P&DUE)
  - Current step: Appraise Utilization of Goals

Performance Review Name
Current Step

Your Performance Reviews
Your Team’s Performance Reviews
Home Screen – Employee View

My Performance reviews

<table>
<thead>
<tr>
<th>Review process</th>
<th>Review step</th>
<th>Manager</th>
<th>Role</th>
<th>Start date</th>
<th>Due date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performance Review 2018-19</td>
<td>Employee Confirmation</td>
<td>Svetlana Eneva</td>
<td>Professional staff</td>
<td>3 Dec 2018</td>
<td>23 Nov 2019</td>
</tr>
</tbody>
</table>

Open review
Home Screen – Supervisor View
Umbrella View for all Direct Reports
Viewing Archived Performance Reviews - Employee

In the About me tab, click the Performance review link.

You will see all of your performance reviews.

Change the status to ARCHIVED and click Search.
Viewing Archived Performance Reviews - Manager

In the My team tab, click the Performance reviews link.

Change the status to ARCHIVED and click Search.
# 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.
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.

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.

This will instruct you on what to do in that section.
Job Responsibilities

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

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.
<table>
<thead>
<tr>
<th>Item title</th>
</tr>
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<tbody>
<tr>
<td><strong>Title</strong></td>
</tr>
<tr>
<td>Test Goal #1</td>
</tr>
<tr>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>write a description of the goal here.</td>
</tr>
<tr>
<td><strong>Status</strong></td>
</tr>
<tr>
<td>Current</td>
</tr>
<tr>
<td><strong>Target date</strong></td>
</tr>
<tr>
<td>23 Oct 2021</td>
</tr>
<tr>
<td><strong>Attachment</strong></td>
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<tr>
<td>Upload document</td>
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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.
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

Emma Employee - Performance Review 2019 - 2020

Start | Job Responsibilities | Goals & Objectives | Areas of Strength (Optional) | Development Plan

Summary

Job Responsibilities

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

Goals & Objectives
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.

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.
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.
• Review Each Section
• Add Comments as needed
  • Save & Share → will be viewable by all
  • Save as Private → only viewable by you
• 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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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.
Step 4: End of Year Final Review - Employee

Emma Employee - Performance Review 2019 - 2020

- Cannot Rate (Supervisor Only)
- Can add comments

Target date: 30 Aug 2024

Add comment

There are no comments for this item.
Step 4: End of Final Review - Employee Year

Rate your Annual performance.

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

Job Responsibilities

Employee:
Each job duty contains a description and percentage of total time.
Please note, job duties are not to be changed within your performance review. Please speak with your Supervisor if you would like to modify the job duties presented below. Changes within performance do not reflect changes to your job description.

Supervisor:
If you would like to adjust the job duties below, please login [here](#) to submit a request via the Recruitment system. Changes to the job duties below will not be reflected against the employees job description.

¬ Auditing - Assist HRIS Coordinator in analyzing and...
Auditing - Assist HRIS Coordinator in analyzing and processing all transactions to maintain timely and accurate information in HRMS, and ensure data integrity through reports, audits and data flow analysis.

Emma Employee
Cannot rate
Hannah Masbad
Cannot rate

• 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.

### Did not meet goal(s):
Did not meet performance requirements nor completed the objective. Did not perform the job satisfactorily; did not produce the quantity, quality and timelines of work expected; unsatisfactory progress in attaining the goal.

### Met goal(s):
Did a good job; handled most assignments within the scope of responsibility. Did not require significant improvement; completed the goal or objective as established.

### Exceeded goal(s):
Exceeded position requirements even on the most difficult and complex aspects of the job. Took additional assignments without negatively affecting other work; goal completed thoroughly, completely, and on or ahead of schedule.
Continue to review each section and add comments as needed.
You will be able to rate the employee one last time.

This averages out all the ratings in the Goals & Objectives section.
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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<th>Due date</th>
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<tr>
<td>Performance Review 2019 - 2020</td>
<td>Complete</td>
<td>Andrew Manager</td>
<td>Professional staff</td>
<td>13 Sep 2019</td>
<td>30 Sep 2019</td>
<td></td>
</tr>
<tr>
<td>Performance Review 2020 - 2021</td>
<td>Complete</td>
<td>Johanna Masbad</td>
<td>Professional staff</td>
<td>30 Sep 2020</td>
<td>20 Sep 2021</td>
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View the report
View progress report
View the review process

Records 1 to 3 of 3
Sample: PDF Version of Completed Review

Emma Employee - Performance Review 2019 - 2020

Role: Professional staff
Manager: Hannah Masbad
Step: Complete

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>
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<th>Your score</th>
<th>Maximum</th>
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Cascading Goals as a Supervisor

Step 1

Go to the Performance Module home page

Hover over the ‘My team’ on the top left and click ‘Organizational Chart’

Step 2

Click your own name on the organizational chart
Cascading Goals as a Supervisor

**Step 3**

Click the **Performance** header.

Locate your current review. Under **Status** find **Current**.

From the 'I want' drop down menu, choose **Cascade Objectives**

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**Step 4**

You will be presented with a listing of your goals and your team members.

![Image of performance review with options to cascade objectives](image-url)
Cascading Goals as a Supervisor

**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
Cascading Goals as a Supervisor

Step 7

Your goals have now been cascaded to the appropriate team member.

Click Close
Questions?

Contact HRISTeam@tc.columbia.edu