



PERFORMANCE MANAGEMENT AT DU

PERFORMANCE REVIEW USER GUIDE

FOR MANAGERS

LOGGING IN

1. Log into [Pioneer@Work](#)
2. Enter your DU credentials (firstname.lastname@du.edu and password) which will bring you to the home screen where you can see your performance management tasks.

Your Action Items

	Due Date
2020-2021 Performance Planning	4/23/2021
2020-2021 Performance Review	8/30/2021
View: Managing Student Employees (Starts 6/18/2020 9:00 AM)	None
View: StrengthsFinder (Starts 6/8/2020 8:00 AM)	None
Open: 2020-21: University Policies & Guidelines	None
Launch: Preventing Harassment and Discrimination (Non-Supervisors)	None
View: StrengthsFinder (Starts 8/4/2020 1:00 PM)	None

Special Announcements

20-21 Performance Reviews for Divisions on the Academic cycle opens on May 17

The next step in the Performance Management program is a year-end Performance Review. Benefited staff in divisions that run on the Academic cycle begin the 2020-2021 Performance Reviews, a four-step process, on May 17 and will be due on June 30, 2021. For resources on how to complete this process, please see the [Resources](#) page with instructional videos and user guides for employees and managers.

Performance Reviews open on Monday, 17, 2021 and run for 6 weeks with all 4 steps due on June 30, 2021.

- Step 1: Employee Self Review is due Tuesday, 6/1
- Step 2: Manager Review is due Monday, 6/14
- Step 3: Manager-Employee Meeting is due Friday, 6/25
- Step 4: Employee Acknowledgement is due Wednesday, 6/30

For more information on timelines, please visit [Performance Management](#) and scroll down to the section called Performance Cycle Timelines.

SYSTEM NAVIGATION

- To return to the Home screen at any time, click on the Pioneer@Work logo at the top left.
- Utilize the “Your Action Items” section to engage with all active tasks throughout the Performance cycle.
- Click “View” under Your Profile to view your Bio, Actions, and a Snapshot of your progress.
- Click “View” under Your Goals to view the items in the Job Goals and Objectives, once created.
- Click “View” under Your Development Plans to interact with your professional development objectives.
- This navigation is also accessible through the hamburger menu at the top right.
- Throughout the process, you have the option to select Back to return to the previous screen, select Save and Exit to exit the system, or select Save and Continue to progress to the next section.

PERFORMANCE REVIEWS ARE A 3-STEP PROCESS

<p>Employee Self Review Due: 6/1/2021</p>	<p>STEP 1 - The Employee Self Review is the employee’s opportunity to document their accomplishments and rate themselves the Job Goals & Objectives and Competencies.</p>
<p>Manager Review and Employee Meeting</p>	<p>STEP 2 - The Manager Review is your opportunity to acknowledge your employee’s accomplishments and hard work throughout the year. You also host a Manager-Employee Meeting with the employee to discuss the performance review, update the final review as needed, and then sign off.</p>
<p>Employee Acknowledgement</p>	<p>STEP 3 - To complete the Performance Review process, the employee gives final Sign Off.</p>



NOTE: Step 1 belongs to the Employee for the Self Review. You, as the manager, own step 2, Manager Review and hosting a Manager-Employee Meeting. You will Sign Off on the Performance Review in Step 3.

STEP 2 - MANAGER REVIEW and MANAGER-EMPLOYEE MEETING

Click on the PERFORMANCE REVIEW task for your direct report.

Your Action Items	
	Due Date
Open: Preventing Harassment & Discrimination (Supervisors)	5/17/2020
2020-2021 Performance Review	8/30/2021
2020-2021 Performance Review for Lenny Learner	9/13/2021

The Manager Review has 6 sections:

Overview
Job Goals & Objectives
Competencies
Professional Developm...
Manager - Employee ...
Summary
Sign Off

SECTION 1: Review your employee’s Job Goals and Objectives and rate their performance on a scale from Unsatisfactory (1) to Exceptional (5).
SECTION 2: Rate your employee on the Competencies on a scale from Unsatisfactory (1) to Exceptional (5).
SECTION 3: Review your employee’s Professional Development plan.
SECTION 4: Host an Employee Meeting. Once you have completed your manager review, click “Save and Exit”. Schedule a time to have a performance review discussion. After you have met, return to this section and continue in the process.
SECTION 5: Review the Summary of the self-ratings on the Job Goals & Objectives and Competencies.
SECTION 6: After your Employee-Manager Meeting, sign off on the review.

Overview

- Review the instructions on the Overview page.
- Navigate to the “Options” button to review the following:
 - Add Co-Planners:** Search for and add a co-planner.
 - Attachments:** Upload up to 3 attachments that are relevant to the performance review.
 - Print Review:** Download a PDF version of the entire review. It is recommended to use this option once you have added your own feedback. You can access “Options” from any page in the review form.
 - Print Reviewee Version:** Download a PDF version of the review with only the employee’s feedback.
- Once you have reviewed the information, click the “Get Started” button. Note: There’s a “Reopen Step” button at the bottom of the page if you need to reopen the performance for the employee after you have your Manager-Employee Meeting.



SECTION 1: Job Goals & Objectives

1. Review each Job Goal and Objective and its status.
2. Click on “More” to view the alignment to the Strategic Imperatives.
3. Use the 5-point rating scale to indicate your rating for each of your employee’s Job Goals and Objectives.
4. Review the employee’s self-rating and comments.
5. In the textbox provided, provide 1-3 robust and clear examples and evidence of the rating you selected.
6. Repeat steps 1-3 for each of the employee’s Job Goals and Objectives.
7. When you have added comments and ratings for each Job Goal and Objective, click on “Save and Continue” at the bottom of the page.

Prepare quarterly meeting presentations

1 Status: On Track
2 Start Date: 3/25/2021
3 Due Date: 9/30/2021
4 more...

3 Advanced (3.5 - 4.49)

4 Comments:
Lenny Learner (Self) Rated: 4 - Advanced (3.5 - 4.49) Review: 2020-2021 Performance Review Time: 5/13/2021 3:28 PM
continually receive great feedback on the timeliness and content of presentations.

5 Lenny's presentations are always impressive and spot on. We gave him a template to work from but he has made it even better; other departments are even considering using it.

7 Back Save and Exit Save and Continue

SECTION 2: Competencies

1. Review each competency description.
2. Select a rating for each competency.
3. Review the employee’s self-rating.
4. Click on “More” to view all of the employee’s comments.
5. Click on the speech bubble icon for prepopulated statements relating to the competency and rating that you can use for your own rating.

Communication

1 Demonstrates clear, timely, and consistent speaking, listening and written communications. Listens and seeks clarification and responds clearly to questions. Listens actively and communicates to others to build trusting relationships. Written communication is clear, grammatically correct, effective and relative to the needs and scope for one's role. Relates effectively to all levels of the institution. Fosters connections and a collaborative approach.
The following are some examples of how an employee might demonstrate this competency:

- Data are presented accurately and presentations are clear and informative.
- Effectively and consistently communicates the organization's strategy and operational goals.
- Helps develop and translate strategy into operational goals and priorities.
- Create reports, memorandums, emails and other required paperwork efficiently, error free and in a timely manner.
- Tailors message and tone to be understood by the receiving audience.
- Communicates with credibility and confidence.
- Speaks directly, promptly and tactfully to address concerns.
- Asks questions to seek clarity.

2 Select

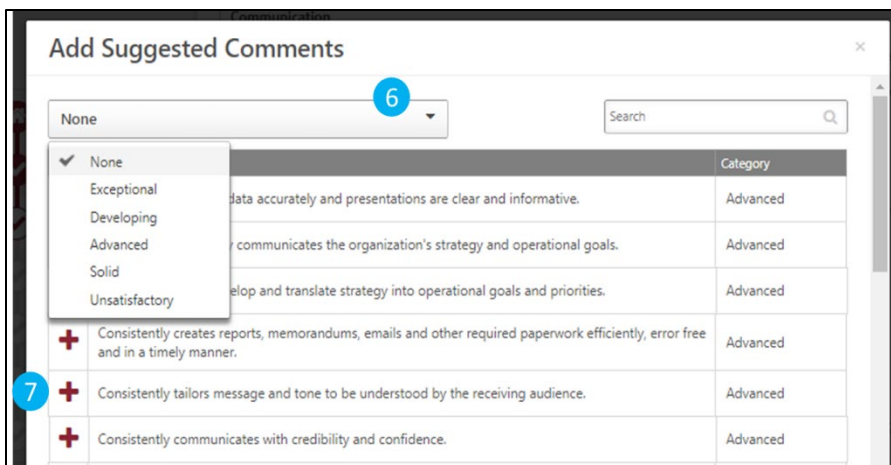
3 Comments:
Lenny Learner (Self) Rated: 3 - Solid (2.5 - 3.49) Review: 2020-2021 Performance Review Time: 5/13/2021 3:33 PM
Often creates reports, memorandums, emails and other required paperwork efficiently, error free and in a timely manner.

4 More

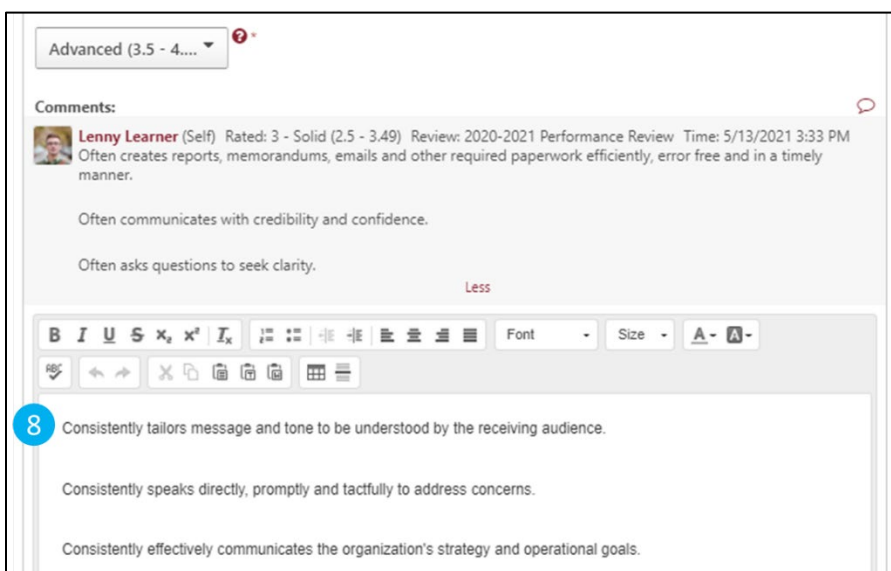
5



- Click on the dropdown menu to select a statement that is in the same category as the rating you have chosen.
- Click on the plus sign **+** to select a comment.

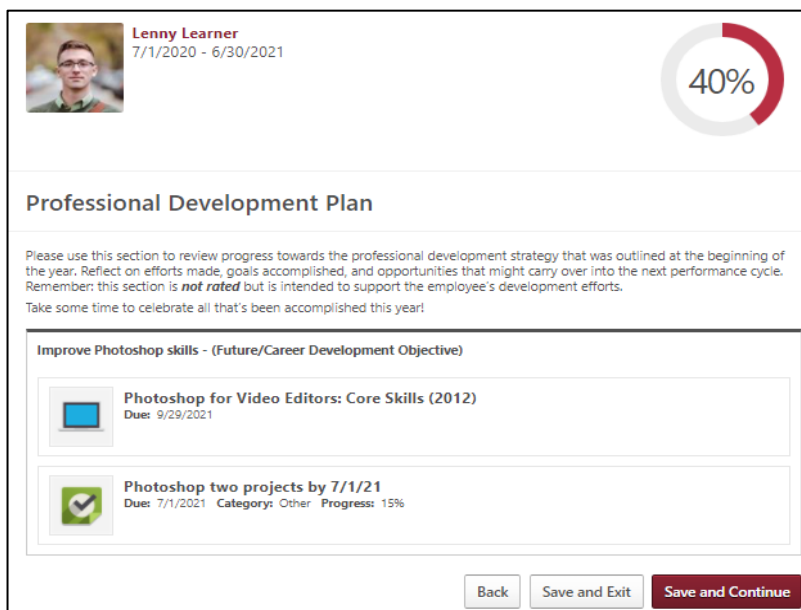


- The comment will immediately appear in the text box for that competency. Repeat steps 5-7 until you have identified 2-3 specific examples or write in your own examples.
- Repeat steps 5-8 for the remaining competencies.
- When you are ready to move on to the next section, click on the red "Save and Continue" button at the bottom of the screen.



SECTION 3: Professional Development Plan

- Review your employee's professional development plan objectives.
- Click on "Save and Continue".





SECTION 4: Manager-Employee Meeting

Once you reach this section, you have completed the Manager Review part of Step 2 and should now schedule your Manager-Employee meeting to discuss the employee's review. **Do NOT click "Save and Continue" until you have met with the employee.**

At this point, if you would like to have a PDF copy of the review to share with your employee, click on "Options" and choose "Print Review" from the dropdown since it has both of your ratings.

Click "Save and Exit".

2020-2021 Performance Review

Lenny Learner
7/1/2020 - 6/30/2021

60%

Manager - Employee Meeting

Please schedule time to discuss the review with Lenny Learner. Do NOT submit this step until you have met with the employee to discuss the content of this performance review. At this point we recommend that you "Save and Exit" and schedule your Employee Meeting.

After your meeting with your Employee, consider the following:

1. If the employee needs to make changes, click on the Overview section in the menu of the left and then click on "Reopen Step". This will send the review back to Step 1, for the Employee to make any edits to their Employee Self Review. Once they make any edits and submit, the form will come back to you.
2. If you need to make any changes to your ratings or comments, click on Job Goals and Objectives and/or Competencies sections listed in the menu of the left.
3. If no changes need to be made by the employee or manager, click "Save and Continue" to proceed to the Summary.

Once your ratings and comments are finalized, enter your first and last name in the Sign Off section. To complete the Manager Review and Employee Meeting step, click **Submit**. Once this step is submitted the ratings and comments will be visible to Lenny Learner, who will complete the Employee Acknowledgment.

Submit this step once the Manager - Employee meeting has taken place.

Back Save and Exit Save and Continue

AFTER your meeting with your employee, return to this page (via your Performance Review task on the Pioneer@Work homepage) and consider the following:

1. If the employee needs to make changes to their ratings, click on the Overview section in the menu of the left and then click on "Reopen Step". This will send the review back to Step 1, for the Employee to make any edits to their Employee Self Review. Once they make any edits and submit, the form will come back to you.
2. If you need to make any changes to your ratings or comments, click on Job Goals and Objectives and/or Competencies sections listed in the menu on the left.
3. If no changes need to be made by the employee or manager, click "Save and Continue" to proceed to the Summary.



SECTION 5: Summary

Review your employee’s overall rating. Once you are ready, click “Next”.


Note: If you need to, you can still make changes to your own ratings and comments by navigating back to the “Job Goals & Objectives” and “Competencies” section.

Summary		
Overall Rating Advanced (3.5 - 4.49)		
	Employee Self Review	Manager Review and Employee Meeting
Job Goals & Objectives	4.00/5.00 Advanced (3.5 - 4.49)	4.00/5.00 Advanced (3.5 - 4.49)
Competencies	3.80/5.00 Advanced (3.5 - 4.49)	3.60/5.00 Advanced (3.5 - 4.49)
Professional Development Plan	N/A	N/A
Manager - Employee Meeting	-	N/A
Overall	3.92/5.00 Advanced (3.5 - 4.49)	3.84/5.00 Advanced (3.5 - 4.49)


Back **Next**

SECTION 6: Sign Off

1. Type your first and last name and click “Sign”. The Employee signature will show as “Pending Signature” since they are the final person who signs off on the review.
2. Add comments to the text box, such as when you met and how long the meeting lasted.
3. Click “Submit”. This will send the Performance Review back to the employee for final sign-off.



Lenny Learner
7/1/2020 - 6/30/2021



Sign Off

A signature does not imply agreement or disagreement, only the acknowledgement that the discussion occurred.

Employee
Pending Signature

Manager

1 First and last name

2 Sign

Comment

3 met with Lenny on 5/20. Submitting review on 5/28.

Back

Save and Exit

4 Submit

QUESTIONS? Reach out to performancemanagement@du.edu