Talent@DU
Performance

HUMAN RESOURCES &
INCLUSIVE COMMUNITY

PERFORMANCE REVIEW USER GUIDE

FOR MANAGERS

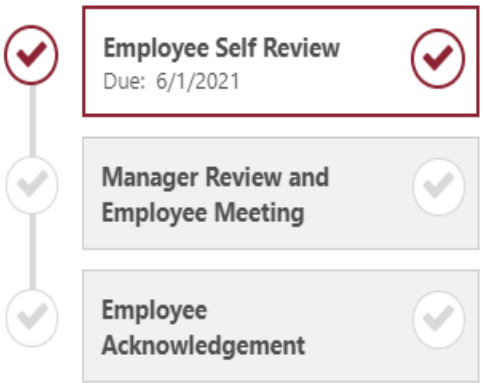
LOGGING IN

1. Log into Talent@DU
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. Select the one you are prepared to work on.

SYSTEM NAVIGATION

- To return to the Home screen at any time, click on the DU 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 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. Back Save and Exit Save and Continue

PERFORMANCE REVIEWS ARE A 3-STEP PROCESS

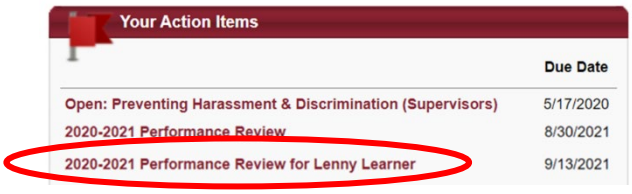


STEP 1 - The **Employee Self Review** is the employee's opportunity to document their accomplishments and rate themseleves the Job Goals & Objectives and Competencies.
STEP 2 - The **Manager Review** is your opportunity to acknowledge your employee's accomplishments and hard work throughout the year. 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.
STEP 3 - To complete the Performance Review process, the employee gives final **Sign Off**.

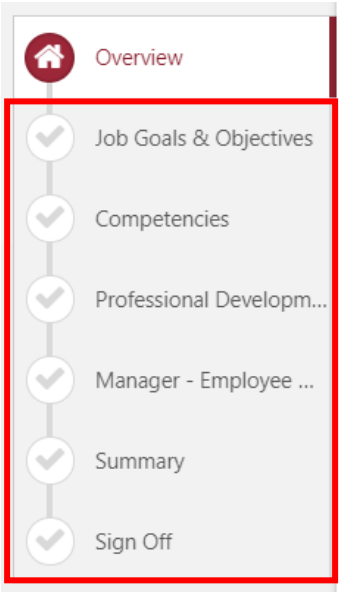
NOTE: Step 1 belongs to the Employee for the Self Review. You, as the manager, own step 2, Manager Review and hosting a Manager-Employee Meeting. You will Sign Off on the Performance Review in Step 3.

STEP 2 - MANAGER REVIEW and MANAGER-EMPLOYEE MEETING

Click on the **PERFORMANCE REVIEW** task for your direct report.

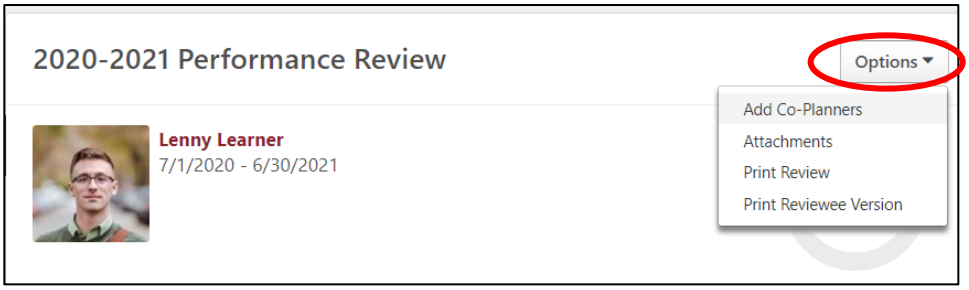


The Manager Review has 6 sections:



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.

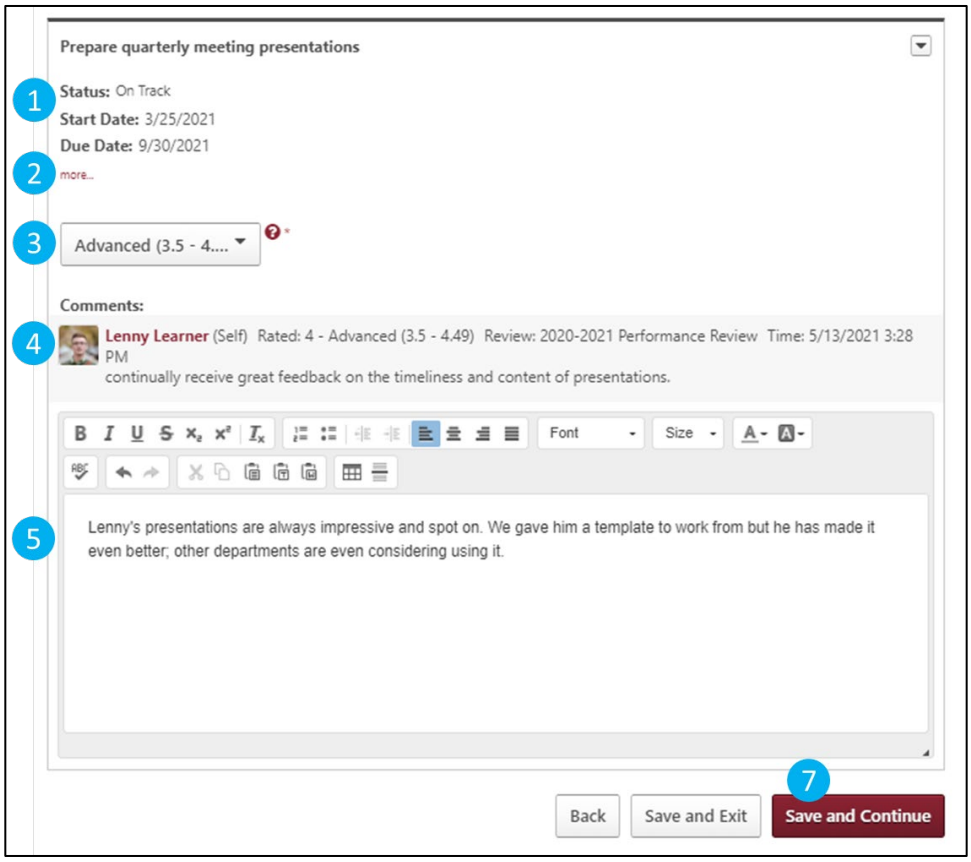
Overview



1. Review the instructions on the Overview page.
2. Navigate to the "Options" button to review the following:
   a. **Add Co-Planners:** Search for and add a co-planner.
   b. **Attachments:** Upload up to 3 attachments that are relevant to the performance review.
   c. **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.
   d. **Print Reviewee Version:** Download a PDF version of the review with only the employee's feedback.
3. 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.

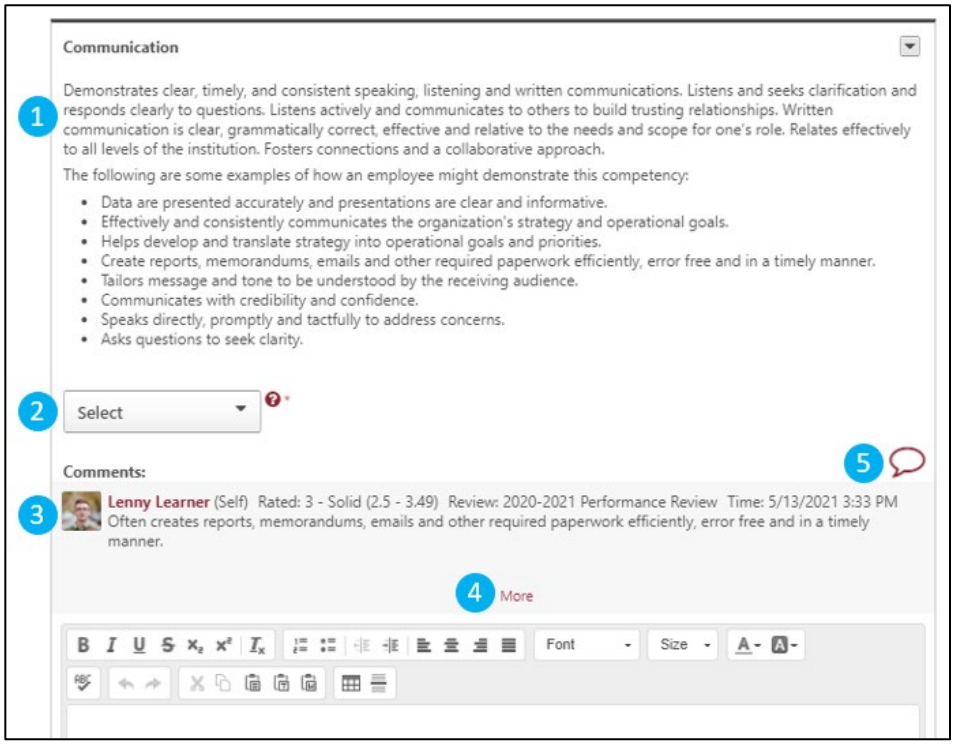
SECTION 1: Job Goals & Objectives

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.

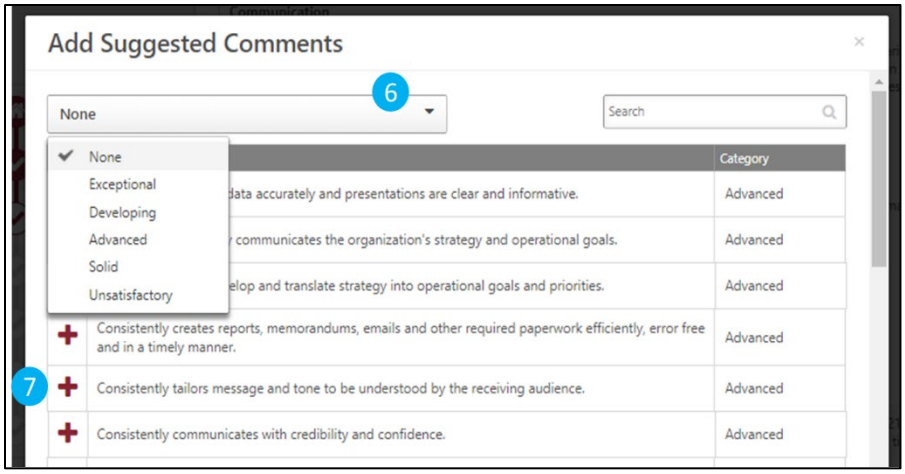


SECTION 2: Competencies

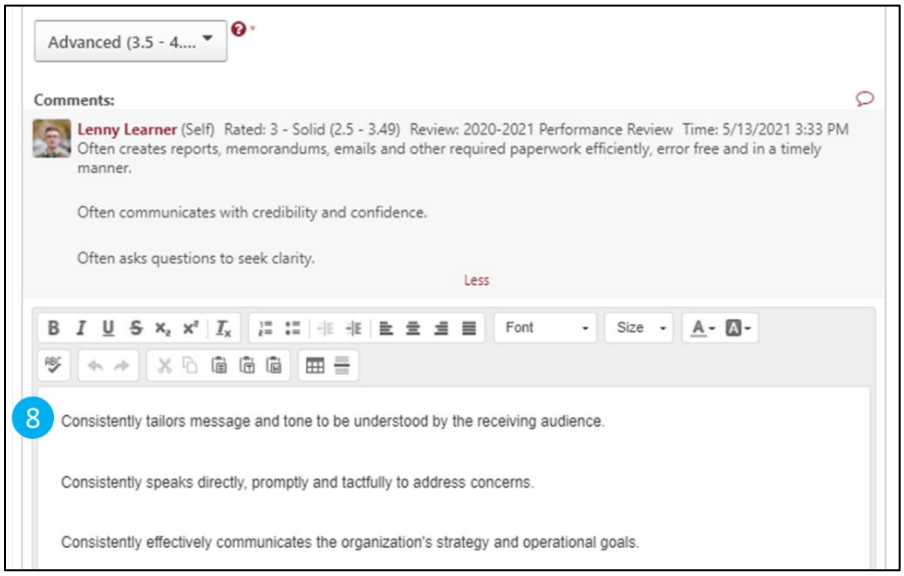
1. Review each competency description.
2. Select a rating for each competency.
3. Review the employee's self-rating.
4. Click on "More" to view all of the employee's comments.
5. Click on the speech bubble icon for prepopulated statements relating to the competency and rating that you can use for your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



6. Click on the dropdown menu to select a statement that is in the same category as the rating you have chosen.
7. Click on the plus sign ✚ to select a comment.

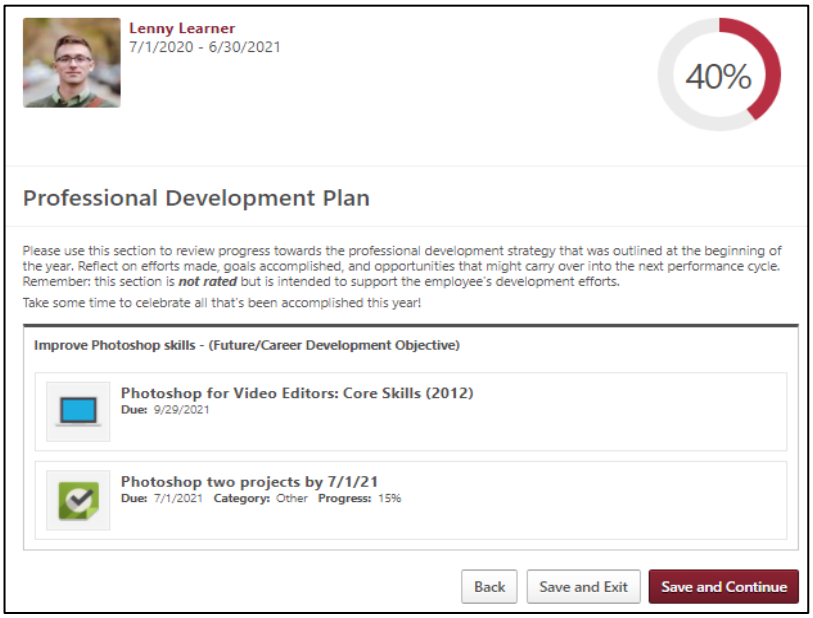


8. The comment will immediately appear in the text box for that competency. Repeat steps 5-7 until you have identified 2-3 specific examples or write in your own examples.
9. Repeat steps 5-8 for the remaining competencies.
10. When you are ready to move on to the next section, click on the red "Save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



SECTION 3: Professional Development Plan

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

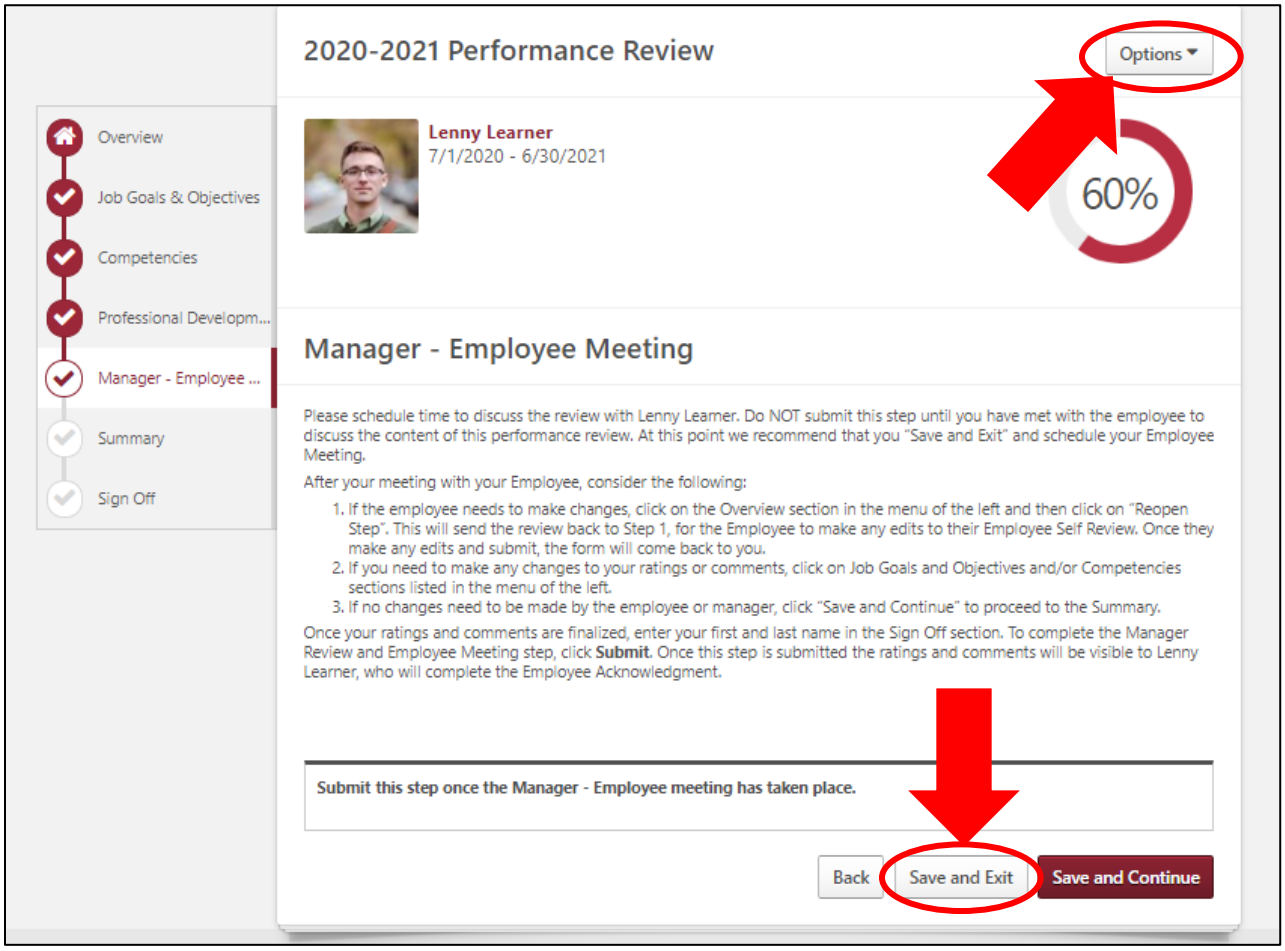


SECTION 4: Manager-Employee Meeting

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".



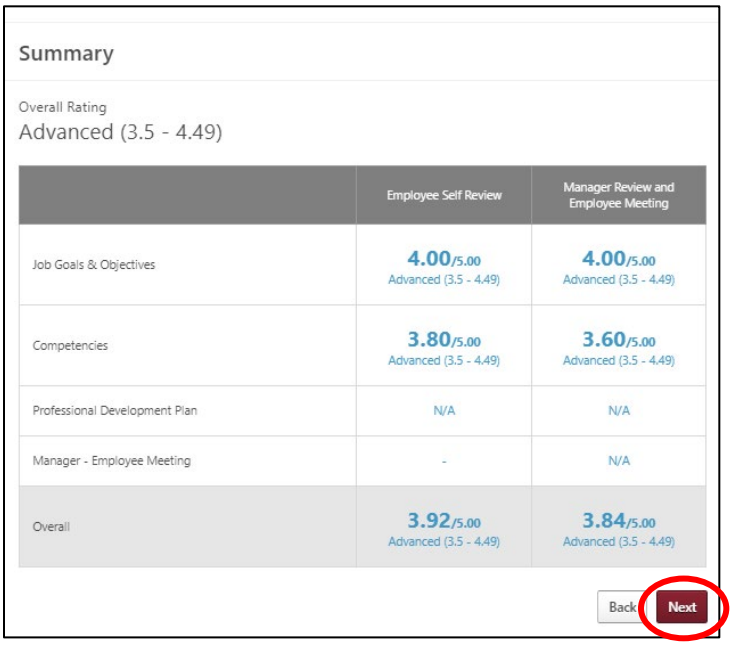
AFTER your meeting with your employee, return to this page (via your Performance Review task on the Talent@DU homepage) and consider the following:

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

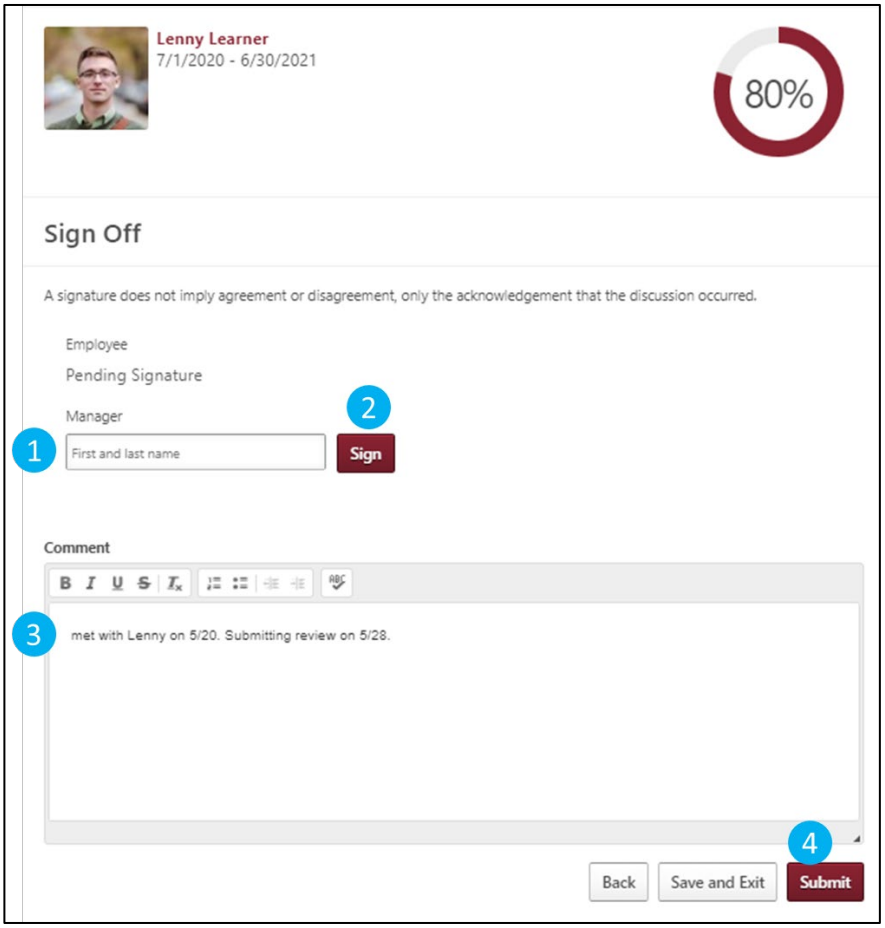
Review your employee's overall rating. Once you are ready, click "Next".

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.



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.



QUESTIONS? *Reach out to performancemanagement@du.edu*