

PERFORMANCE REVIEW USER GUIDE



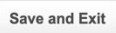

FOR MANAGERS

LOGGING IN

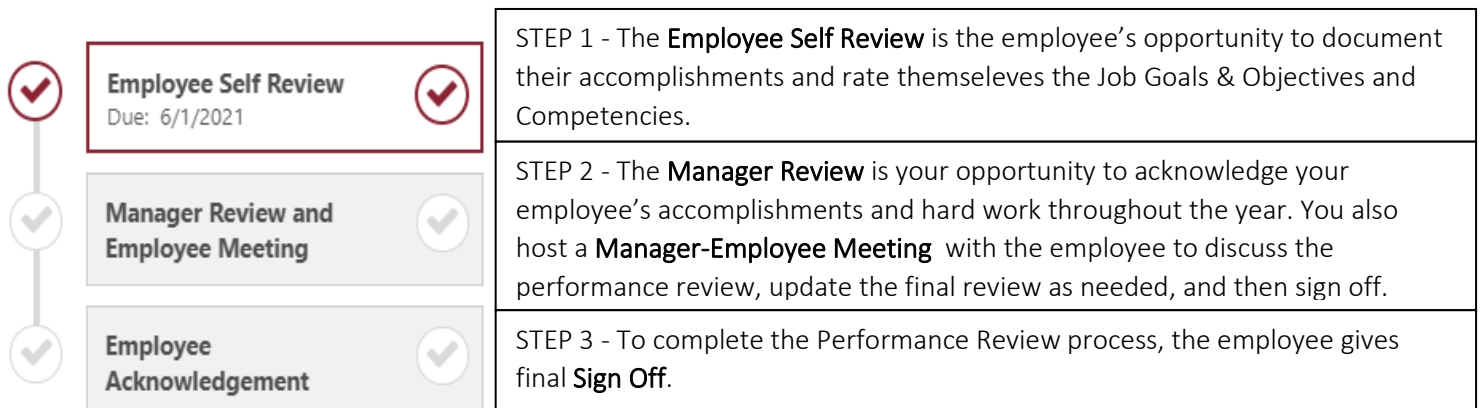
1. Log into [Talent@DU](#)
2. Enter your DU credentials (firstname.lastname@du.edu and password) which will bring you to the home screen where you can see your performance management tasks. Select the one you are prepared to work on.

Your Action Items	
	Due Date
2022-2023 Performance Review	4/16/2023
2022-2023 Performance Review for Eric Employee	4/30/2023

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.   

PERFORMANCE REVIEWS ARE A 3-STEP PROCESS



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
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

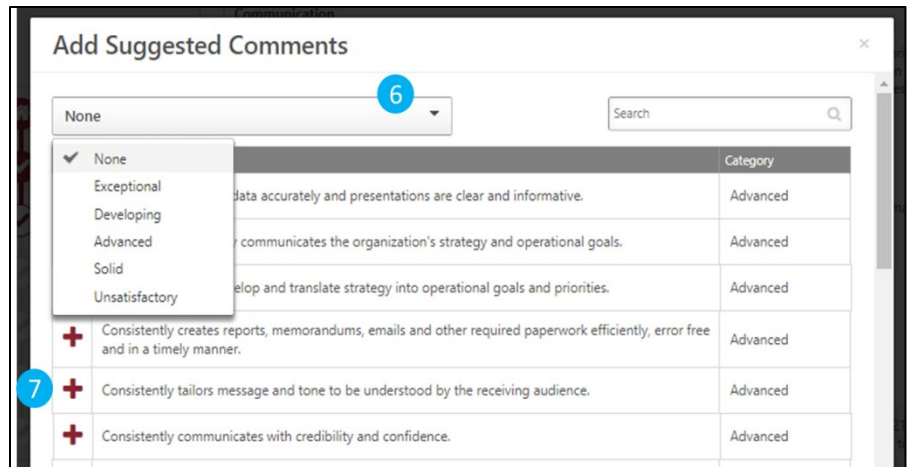
3 Comments:
Lenny Learner (Self) Rated: 3 - Solid (2.5 - 3.49) Review: 2020-2021 Performance Review Time: 5/13/2021 3:33 PM
Often creates reports, memorandums, emails and other required paperwork efficiently, error free and in a timely manner.

4 More

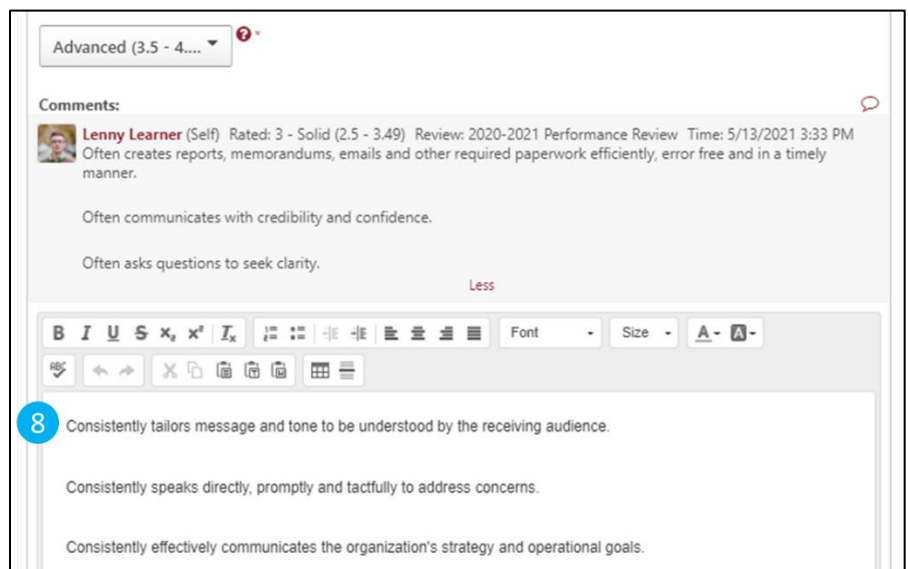
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Back Save and Exit Save and Continue

- 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.

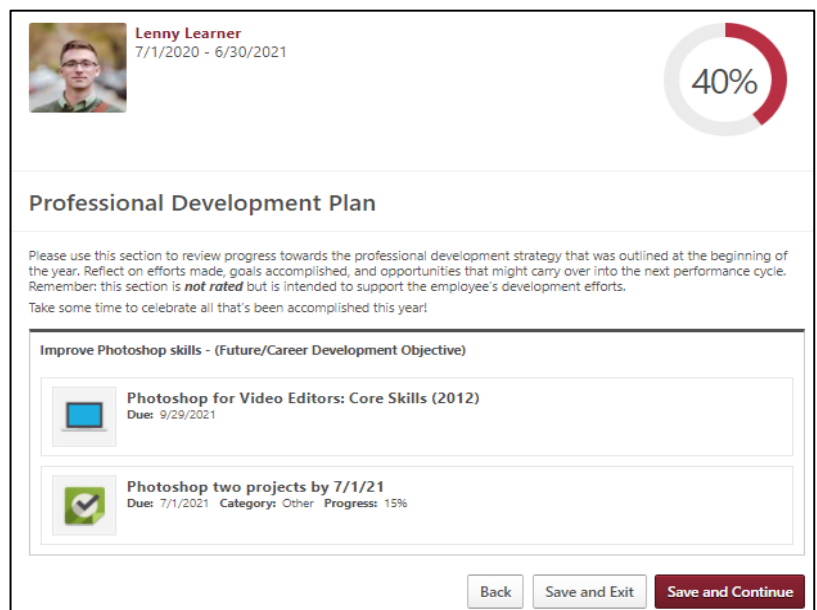


- The comment will immediately appear in the text box for that competency. Repeat steps 5-7 until you have identified 2-3 specific examples or write in your own examples.
- Repeat steps 5-8 for the remaining competencies.
- When you are ready to move on to the next section, click on the red "Save and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

The screenshot displays the '2020-2021 Performance Review' page for Lenny Learner (7/1/2020 - 6/30/2021). On the left is a navigation menu with 'Manager - Employee Meeting' selected. The main content area shows a 60% progress indicator and a section titled 'Manager - Employee Meeting' with instructions to schedule a meeting and submit the review. At the bottom, there are three buttons: 'Back', 'Save and Exit', and 'Save and Continue'. Red annotations highlight the 'Options' dropdown menu in the top right and the 'Save and Exit' button at the bottom.

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.


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)

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

B I U S I x

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

QUESTIONS? Reach out to performancemanagement@du.edu