

# Online Performance Review Supervisor Process Flow

(updated 8/9/17)

This is an 8 step process that begins with the Supervisor/Manager logging into the Online Performance tool at performance.berkeley.edu. Once on the Dashboard, you'll follow the built in guidelines and prompts. We've also created a step by step guide below. Let's begin!

Step 1. The Supervisor/Manager opens a form on the Dashboard.

a. If the employee's FY16 review was completed online, you will be able to import this year's goals directly from last year's form by clicking on the *Id* or *the employee's name*.

b. Otherwise, you will be asked to enter this year's goals. Very easy to do by clicking "Start New Form"

Id	Employee Name	Review Period
2537	Paul K Carroll, MPA	July 01, 2016 - June 30, 2017

Click "Save Changes" at the bottom of the form whenever changes are made.

Save Changes Open Employee Self-Assessment Release Draft To Employee Proceed To Signatures Delete

Step 2. After retrieving last year's goals, or entering new ones (**and saving**) the Supervisor opens the form for employee self-assessment by clicking "Open Employee Self-Assessment". (The employee is sent an email when this button is clicked). **Note:** This step is optional.

Save Changes Open Employee Self-Assessment Release Draft To Employee Proceed To Signatures Delete

Step 3a. After the employee completes their self-assessment and clicks "Save Changes; Finish Employee Access", **the review will route back to the Supervisor**. The Supervisor will receive an email notification that the employee has completed this step.

**Note:** Do not select "Close Employee Self-Assessment" unless there is a reason to close the review. The employee will not have viewing rights once "Close Employee Self-Assessment" is clicked, nor will they be able to complete the self-assessment. It will be greyed out on the employee's view.

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Remember –

1. You must save changes (orange button at bottom) before exiting or printing the form
2. You can print at any time by clicking the print button in the lower right (it will only print what you have saved).

Step 3b. The Supervisor is able to close the form to employee's input by clicking "Close Employee Self-Assessment" if necessary; otherwise there is no need to take this step.



Step 4. The Supervisor will now enter their comments for each goal listed. **Note:** we recommend you do not enter a rating at this step; although, the form will permit you to do so. Don't forget to "Save Changes".



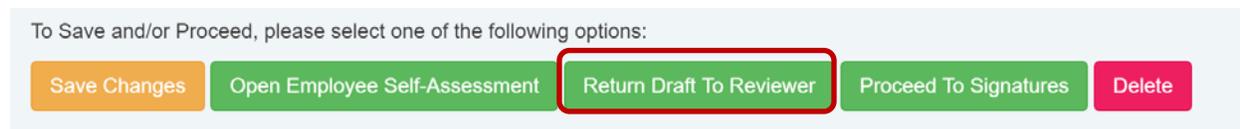
Step 5a. The Supervisor routes the draft review to the employee for review and discussion by clicking "Release Draft To Employee". **Note:** This step is optional.

If draft is not reviewed with employee, go to Step 7.



Step 5b. The employee returns the draft review to the Supervisor after reviewing. The employee is unable to make edits to the draft review. The Supervisor will receive an email notification that this step has been completed.

Step 6. The Supervisor now closes the draft review to the employee, and makes any changes if needed, by clicking "Return Draft To Reviewer". A rating is entered at this step.



Step 7. When the performance review is complete, select "Proceed to Signatures", which locks the content. The Second level manager is notified by email that the form is open for their review (and it now shows up on the 2<sup>nd</sup> level's Dashboard).

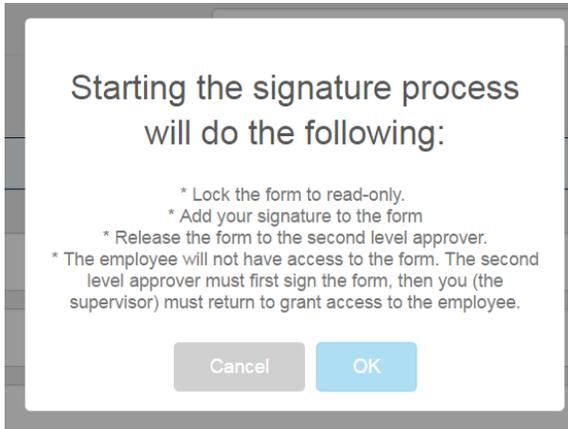


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A prompt will appear after selecting the “Proceed to Signatures” button:



This confirms that you are ready to move from **DRAFT MODE** to **APPROVAL MODE**

Select **OK**, and the form will be released to your second level manager for their review and signature.

Step 7a. The Second level manager reviews the form and e-signs by clicking “Add Signature”, or provides edit direction to the supervisor (second level manager cannot make edits). The Supervisor is notified by email that second level manager has signed.

**Signatures** Reviewer: if your unit requires a second-level approver, enter his/her name below; else, enter your own name on the second-level approver line.

Reviewer	Allison Layton	Allison Layton added on June 29, 2017
Second Level Approver	Allison Layton	<b>Add Signature</b>
Employee	Mr. Khattab McIntosh, BA	

Steps 7b. If changes are necessary, the supervisor will select the “Open for Editing. Signatures will be removed” and makes any necessary changes, then re-signs and sends the review back to the second level (repeating steps 7 and 7a) by selecting “Add Signature”.

To Save and/or Proceed, please select one of the following options:

**Open for Editing. Signatures will be removed**

Dashboard Print

Step 8. IMPORTANT – Once the “Add Signature” has been selected, a new button appears “Final, Discuss with employee”. The Supervisor releases the form to the employee by clicking “Final, Discuss with employee”. (This is the most often missed step). The employee will not have

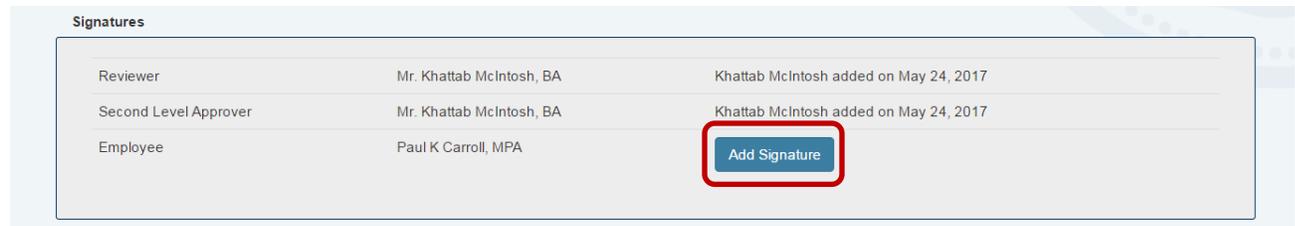
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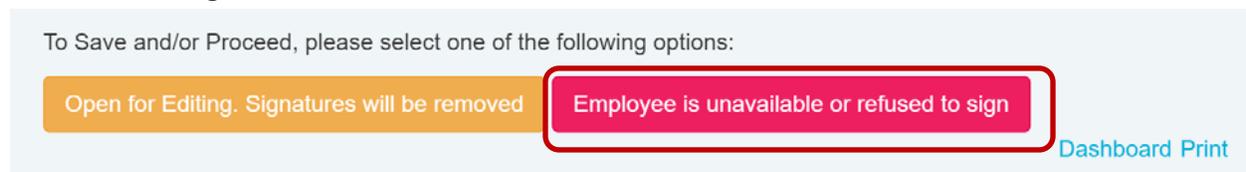
visibility of the completed performance review until this is selected).



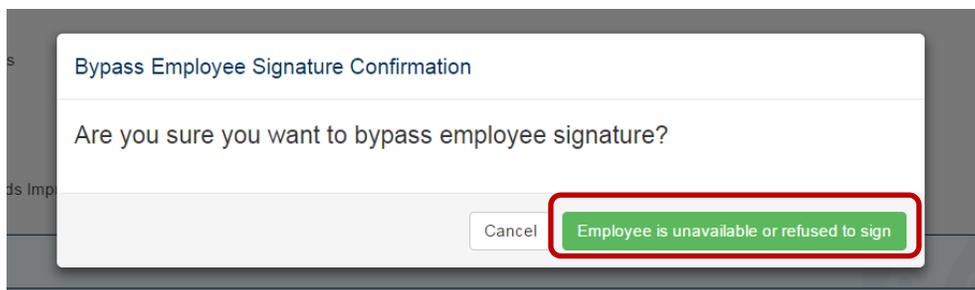
Step 8a. The employee e-signs the review indicating they have received an electronic copy. If they have comments about the review itself, they can enter comments in the free form text box found at the end of the review. The employee can enter comments prior to signing or refusing signature.



Step 8b. In some cases, the employee will either not be available to sign the review, or declines to acknowledge receipt. In those cases, the supervisor can select the “Employee is unavailable or refused to sign”



If you do select the “Employee is unavailable”, you will get a reminder box (see below). If it was chosen intentionally, check the “Employee is unavailable or refused to sign”



And you're done!

The electronic Online Performance Review form is automatically sent to CSS for filing at the close of review period.

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