



# Performance Review 2017-18

# Performance Review

Access the form by clicking [Performance.berkeley.edu](https://performance.berkeley.edu)

## Questions?

Contact Campus Shared Services HR at 510-664-9000, option 3. Or submit your question to [performance management](#) and our CSS partners will respond. Also, refer to the FAQs found on the performance management website by clicking [FAQs](#)

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# Performance Review

performance.berkeley.edu

## Dashboard

- Read overview and instructions
- Start New Form
- Access existing and previously completed reviews
- Confirm Signature status
- Confirm Comments - Private or Shared (New Feature)

## Performance Planning & Review Dashboard

### Manager, Supervisor, and Non-represented Staff

Welcome to the FY2018 Annual Review Process! To complete annual reviews for the period July 1, 2017 - June 30, 2018, follow these eight steps for each non-represented employee:

1. To open a new form — press the "Start New Form" button below
  - a. If the employee's FY17 review was completed online, you will be able to import this year's goals directly from last year's form.
  - b. Otherwise, you will be asked to enter this year's goals.
2. Route the form to the employee, so that s/he may enter a self-review (optional step).

Likewise, enter your feedback.

  - a. **NEW:** The employee is able enter a comment for each goal.
  - b. **NEW:** The employee and manager/supervisor can enter comments on the form in a *private mode* simultaneously. However, no one other than the author can **read** the comments until the *share mode* is selected. The share mode makes comments visible to the other party (i.e., if the manager selects "share", the employee can see the manager's comments; if the employee selects "share", the manager can see the employee's comments.) Both can go back and forth between these modes until they come to a final draft of the review.
  - c. **NEW:** Unlike past years, the online system won't send email alerts at this point in the process. The private/shared status for each review should be communicated in person, and will be displayed on the Dashboard.
3. Discuss and finalize the preliminary review with the employee. Note: Edits may still be made. This is also the last opportunity to finalize 2018-2019 goals.
4. Enter a performance rating. Close the review to the employee. Send the performance evaluation to the 2<sup>nd</sup> level approver.
  - a. **NOTE:** Performance ratings will not be visible to the employee until the second-level approver signs off.
  - b. The 2<sup>nd</sup> level approver has two choices: (1) select **Approve** and sign the review; or, (2) select **Resubmit** (and enter comments) to return the form to the reviewer for revision.
5. Confirm that the 2nd level approver has signed off on the review.
6. Send the final review to the employee and meet for a formal conversation.
7. Reviewer signs.
8. Release the form to the employee for signature.

After signatures are complete, the rating is passed to the HCM merit roster. At the close of the review period in September, forms will be sent to CSS automatically for filing.

Please select Help at the top of the dashboard to access the job aid and/or FAQs. If the answer to your question isn't found, please contact Campus Shared Services HR at 510-664-9000, option 3 or submit your question via [performance management](#).

To get started, click "Start New Form" — or, if you've already begun a form, click on the name of the employee whose form you'd like to edit from the list on the dashboard below.

**Instructions for employees:** Click your name below to start entering comments for each goal on the form. If your name isn't listed, your manager/supervisor hasn't started a form for you yet. Please confirm with your manager.

Start New Form

Id	Employee Name	Review Period	Rating	Supervisor Signature	Second Level Approver Signature	Employee Signature	Supervisor Comments	Employee Comments
3094	<a href="#">Mr. Khattab McIntosh, BA</a>	July 01, 2017 - June 30, 2018					Private	Private
3157	<a href="#">Mr. Khattab McIntosh, BA</a>	July 01, 2017 - June 30, 2018	Exceeds Expectations	✓			Shared	Private



[Start New Review](#)

# Start Form Wizard

From Dashboard, select “Start New Form”.

## Employee Search

1. From the **Employee Search** page, enter the name of person and select “Search”.
2. Results of search will display. Locate the person you want, and choose “Select” to continue.

1

Start New Form

## Employee Search

Please enter the name of the person you are starting a review for, and press Search.

First Name	Last Name	Search
<input type="text"/>	<input type="text" value="mcintosh"/>	<input type="button" value="Search"/>

## Select Employee

Please select the employee you are looking for. If she/he does not appear on the list, please report the problem to [performance-management@berkeley.edu](mailto:performance-management@berkeley.edu).

	First Name	Last Name	Email
<input type="button" value="Select"/>	Austin	McIntosh	ausx@berkeley.edu
<input type="button" value="Select"/>	Cathy	McIntosh	cathymc@berkeley.edu
<input type="button" value="Select"/>	Khattab	McIntosh	khmcintosh@berkeley.edu
<input type="button" value="Select"/>	Megan	McIntosh	megnmcintosh@gmail.com

# Start Form Wizard

## Job Information

1. On the **Job Information** page, locate the job you are reviewing and choose **“Select”** to continue.

## Job Information

All jobs for this employee appear below. Select the job you are reviewing — if it does not appear on this list, use the “back” button to go back to the prior screen. Note: the employee’s name does not appear on this screen.

	Job Title	Supervisor Name	Department	Division (L3)
 <b>Select</b>	Information Systems Analyst 3	Yu-Tin Kuo	Enterprise Application Service	Administration & Finance

# Start Form Wizard

## Employee Review Records

1. On the **Employee Review Records** page, locate previous year goals to import and choose **“Select”**. Goals will be imported into the new review form.

If the Employee does not have a previous review available or there is no need to import previous goals, choose **“Start Blank Form”**.

## Employee Review Records

First Name	Last Name	Email
Khattab	McIntosh	khmcintosh@berkeley.edu

To import **FY 18** goals to this year’s review form, select the **FY 17** (or most recent) review form for this employee.

 **Select** Annual Review 2016 - 2017

If employee did not have an **FY 17** review, or if the **FY 17** review was completed on a paper form: click **“Start Blank Form”** to initiate this year’s review.

**Start Blank Form**



# Performance Review Form - Draft

# Review Form - Draft

1. **Review Period** - choose Annual, Probationary or Custom date range for review.
2. **Employee** - displays job information of employee
3. **Goals** - Edit existing goals and/or enter new goals. Supervisor/Reviewer can comment on each goal.

*New Feature: Employees can now add comments to their goals. For the Reviewer/Supervisor, Employee comments are read-only. The same is true for Employees. The Reviewer/Supervisor comments are read-only.*

*New Feature: Click on “you open access to employees” and the tool will scroll to the bottom of the form. There you can save changes and open the employee self review option.*

## Review Period

If this review is for a different period than shown below, select the appropriate option from the drop-down menu.

\* Review Period:

Annual (July 1, 2017 - June 30, 2018) ▾

## Employee

Employee Name	Job Title	Department	School, College, or Division
Mr. Khattab McIntosh, BA	Information Systems Analyst 3	JKASD	VCBAS

## Goals

If employee's goals have changed over the year, revise them appropriately. If you need to add a goal, click the button at the end of the goals section. Only reviewers can enter text in this section.

**Goal #1**

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**Supervisor Comments on Goal #1**

Comments on Goal 1

Comments may be made visible to employees after [you open access to employees.](#) ←

**Goal #2**

Goal 2

**Supervisor Comments on Goal #2**

Comments on Goal 2

Comments may be made visible to employees after [you open access to employees.](#)

# Review Form - Draft

1. **Comments on Overall Performance**  
- Reviewer/Supervisor can enter comments on overall performance. Employees can enter in comments on overall performance. Employee comments are read-only for Supervisor
2. **Compliance Training Check Off** - Reviewer can select all that have been completed this review period.  
**Note: Merit Increases for Supervisors and Managers are contingent on completion of mandatory Sexual Violence and Sexual Harassment prevention training by all subordinate staff, and themselves, by June 30<sup>th</sup>. Completion is validated through LMS, not this checkbox. These checkboxes are here for the purpose of prompting a conversation about learning and development between the supervisor and employee.**
3. **Supporting Operating Principles** - Reviewer can select all that apply

## Comments on Overall Performance

Only employees can enter text in the employee self-assessment box. Only reviewers can enter text in the supervisor comments box.

### Supervisor Comments on Review Period Performance

## Compliance Training Check Off

Please identify all training the employee has completed during this evaluation period:

- Sexual Violence and Sexual Harassment Prevention
- Cyber Security
- Ethics to include Form 700 and CHOIR
- All job-related training, i.e. Laser Safety, Blood Borne Pathogens, FERPA, etc.

## Operating Principles

Which Operating Principles did this year's performance best support?

- We include and excel, together
- We imagine and innovate
- We simplify
- We are accountable to each other
- We focus on service.
- N/A

# Review Form - Draft

1. **Rating** - Reviewer/Supervisor - can enter Rating. Note: Ratings are hidden to Employee during draft stage of review form. Ratings will be visible to Employee after signature process begins
2. **Signatures** - Reviewer can search and assigned a Second Level Approver. *Note: A Second Level Approver and Rating is required to being signature process.*
3. **Next Period Goals** - Supervisor / Employee to propose goals for next year.

## Rating

### Overall rating for the period

- Exceptional
- Exceeds Expectations
- Meets Expectations
- Needs Improvement
- Unsatisfactory

- By checking "Needs Improvement" or "Unsatisfactory", you must complete a [Performance Improvement Plan \(PIP\)](#).

## 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	EMP-STAFF TEST
Second Level Approver	<input type="text" value="Enter &amp; Select Name of 2nd Level Approver"/>
Employee	Mr. Khattab McIntosh, BA

## Next Period Goals

List the top 3-5 Goals & Expectations for next period, including one professional development goal.

Goal 1 - Professional Development Goal
Goal 2
Goal 3
Goal 4
Goal 5



**Performance Review Form Draft - Show / Hide Comments**

# Review Form - Draft

## New Feature: Show/Hide Comments

Reviewer and Employee now have the option to hide or show comments during the draft stage of the review. This is referred to as “Private/hide and Shared/show”

To hide or show comments to Employee, select “Show Comments To Employee” or “Hide Comments From Employee”

The employee has the option to share comments on the form, while still maintaining access, before sending it to the Supervisor for approval, by clicking “Show Comments to Supervisor”

A pop-up notification to inform Reviewer that comments will now be visible to Employee

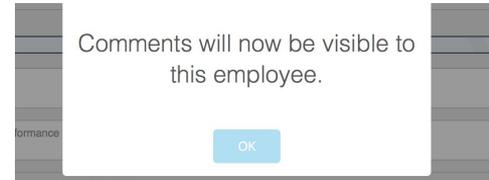
Reviewer and Employee can check on comments status from the Dashboard

Reviewer and Employee can check on comments status from the top of review form

## Check on Comment Status - Dashboard

Id	Employee Name	Review Period	Rating	Supervisor Signature	Second Level Approver Signature	Employee Signature	Supervisor Comments	Employee Comments
3043	Mr. Khattab McIntosh, BA	July 01, 2016 - June 30, 2017	Meets Expectations		✓	✓	Private	Private
3202	Mr. Khattab McIntosh, BA	July 01, 2017 - June 30, 2018	Exceptional	✓			Private	Private
3129	Mr. Khattab McIntosh, BA	July 01, 2016 - June 30, 2017	Meets Expectations	✓	✓	✓	Private	Private
3179	Mr. Khattab McIntosh, BA	July 01, 2017 - June 30, 2018	Meets Expectations	✓	✓	✓	Shared	Shared

## Notification alert when Reviewer makes comments available for Employee



## Form status / Comment status shown at top of review form

**Employee Self-Review Active**

This performance review is currently open to the employee for updates.  
Supervisor comments are visible to the employee.

## Employee button options to show comments

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

[Save changes](#) [Show Comments to Supervisor](#) [Save Changes; Show Comments to Supervisor; Return Performance Review to Supervisor](#)

# Review Form - Draft

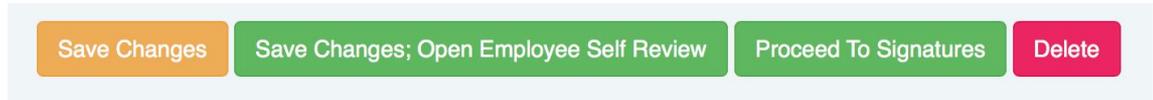
## Action Buttons - Supervisor

1. **Save Changes** - Saves changes
2. **Open Employee Self-Review / Close Employee Self-Review** - opens or closes access to the Employee.
3. **Show Comments To Employee / Hide Comments From Employee** - Reviewer hides or shows comments to Employee. *Note: Comments are hidden by default for both Employee and Reviewer/Supervisor*
4. **Proceed To Signatures** - begins signature process
5. **Delete** - deletes form. Forms can not be retrieved once deleted

## Supervisor Action Buttons (pre-signature)

- Save Changes
  - Open Employee Self-Review / Close Employee Self-Review
  - Show Comments To Employee / Hide Comments From Employee
  - Proceed To Signature
  - Delete
- 

### Supervisor options when form is **closed to Employee**



### Supervisor options when form is **open to Employee**





# Performance Review Form - Signature Process

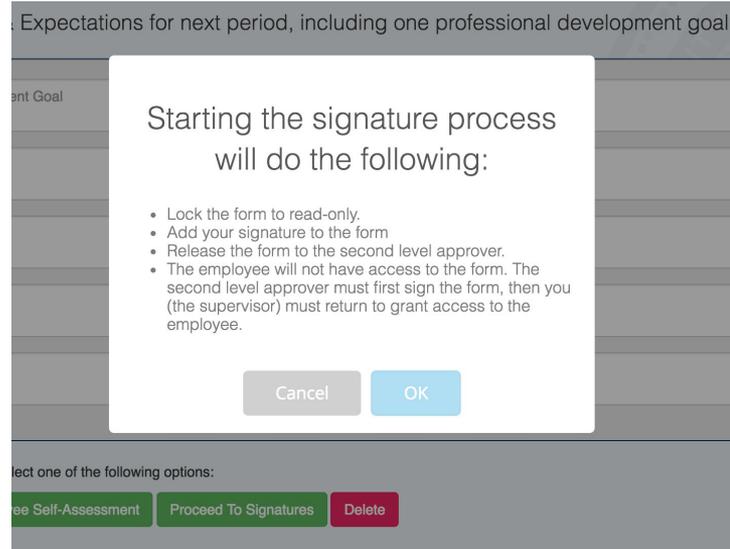
# Review Form - Signature

To begin the signature process, a Rating and 2nd Level Approver is required.

The Reviewer selects “**Proceed To Signatures**” to begin the signature process. At this time:

- *Form is read-only*
- *Reviewer signature added*
- *Comments will be visible to Reviewer, Employee and 2nd Level Approver*
- *Releases form to 2nd Level Approver*
- *Access to form for Employee will be closed*

## Supervisor Action Buttons (pre-signature)



**Pop up notification when Reviewer begins Signature Process**



# Performance Review Form - 2nd Level Approver

# Review Form - Signature

## 2nd Level Approver

New Feature: Approve or Reject (refuse to agree) - The 2nd Level Approver can approve or refuse to agree to the submitted review.

To Approve - Select **'Add Signature'** from the Signature section of the review form. Next, select **'Approve; Send Back To Supervisor'**

To Reject (refuse to agree) - Leave comments for Supervisor in the comments field and select **'Return to Supervisor for Revision'**

**Please note:** The 2nd Level Approver must enter comments when requesting the supervisor to revise the review.

The comments will not become part of the final review when forwarded to CSS.

## 2nd Level Approver Action Buttons (Signature)

- Add Signature
- Open for Editing; Signatures will be removed
- Approve; Send Back To Supervisor
- Reject; Send Back to Supervisor To Resubmit

### 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	EMP-STAFF TEST	EMP-STAFF TEST added on May 23, 2018
Second Level Approver	<input type="text" value="EMP-STAFF TEST"/>	<input type="button" value="Add Signature"/>
Employee	Mr. Khattab McIntosh, BA	

### 2nd Level Approver Signature

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

Open for Editing. Signatures will be removed

Approve; Send Back to Supervisor

Return to Supervisor for Revision

[Dashboard Print User Guide](#)

# Review Form - Draft

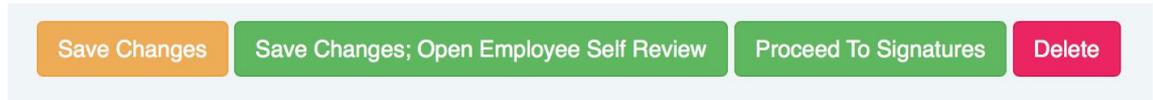
## Action Buttons - Supervisor

1. **Save Changes** - Saves changes
2. **Open Employee Self-Review / Close Employee Self-Review** - opens or closes access to the Employee.
3. **Proceed To Signatures** - begins signature process
4. **Delete** - deletes form. Forms can not be retrieved once deleted
5. **Show Comments To Employee / Hide Comments From Employee** - Reviewer hides or shows comments to Employee. *Note: Comments are hidden by default for both Employee and Reviewer/Supervisor*

## Supervisor Action Buttons (Pre-Signature)

- Save Changes
  - Open Employee Self-Review / Close Employee Self-Review
  - Show Comments To Employee / Hide Comments From Employee
  - Proceed To Signature
  - Delete
- 

### Supervisor options when form is **closed to Employee**



### Supervisor options when form is **open to Employee**



# Form Returned From - 2nd Level Approver

## Action Buttons - Supervisor

1. **Open for editing. Signatures will be removed** - Re-opens the form and signatures are removed. The 1st level supervisor may make edits to the form as necessary.
2. **Final; discuss with employee** - The 2nd level approver has signed the form and it may now be discussed with the employee. Employee will have the opportunity to acknowledge receipt of form with a signature.
3. **Employee is unavailable or refused to sign** - Ends the signature process

## Supervisor Action Buttons (Signature Process Post 2nd Level Approver Signing)

- Open for Editing. Signatures will be removed
- Final; discuss with employee
- Employee is unavailable or refused to sign

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### Supervisor options when the form is returned from 2nd Level Approver

Open for Editing. Signatures will be removed

Final; discuss with employee

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### Supervisor options when the form is finalized and awaiting Employee Signature

Open for Editing. Signatures will be removed

Employee is unavailable or refused to sign

