Performance Review 2017-18
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# 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 2nd level approver.
   a. **NOTE:** Performance ratings will not be visible to the employee until the second-level approver signs off.
   b. The 2nd 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.

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**Start New Form**

### Performance Review

**Dashboard**

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

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<table>
<thead>
<tr>
<th>Id</th>
<th>Employee Name</th>
<th>Review Period</th>
<th>Rating</th>
<th>Supervisor Signature</th>
<th>Second Level Approver Signature</th>
<th>Employee Signature</th>
<th>Supervisor Comments</th>
<th>Employee Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>3094</td>
<td>Mr. Khattab McIntosh, BA</td>
<td>July 01, 2017 - June 30, 2018</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Private</td>
</tr>
<tr>
<td>3157</td>
<td>Mr. Khattab McIntosh, BA</td>
<td>July 01, 2017 - June 30, 2018</td>
<td>Exceeds Expectations</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Shared Private</td>
</tr>
</tbody>
</table>

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*Note: The table above shows the status of completed reviews.*
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.
Start Form Wizard

Job Information

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

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

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.
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.*
1. **Comments on Overall Performance**
   - Reviewer/Supervisor can enter comments on overall performance. Employees can enter 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 30th. 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.

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### 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 CHOR
- [ ] All job-related training, i.e. Laser Safety, Bloodborne 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 assign a Second Level Approver. Note: A Second Level Approver and Rating is required to begin signature process.

3. **Next Period Goals** - Supervisor/Employee to propose goals for next year.

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**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: Enter & 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
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.

A new feature: Show/Hide Comments.

Form status / Comment status shown at the top of the review form.

Employee button options to show comments.
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 cannot 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

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

- Save Changes
- Save Changes; Open Employee Self Review
- Proceed To Signatures
- Delete

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

- Save Changes
- Show Comments to Employee
- Save Changes; Close Employee Review
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)

![Supervisor Action Buttons]

*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 apart of the final review when forwarded to CSS.
**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

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

- Save Changes
- Save Changes; Open Employee Self Review
- Proceed To Signatures
- Delete

---

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

- Save Changes
- Show Comments to Employee
- Save Changes; Close Employee Review
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

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**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