Guide for End of Year Review
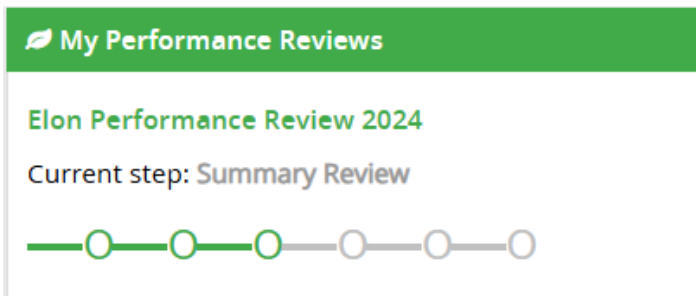
When you login the landing page will now show you are in the "Summary Review" stage, which is due no later than January 26th.

Reminder that the process will take you through each screen, starting on the "Start Screen". You will follow the instructions on each page progressing from "Start", to "Goals", to "Competency Assessment", to "Mid-Year Check-In", and finally to the "Next Steps" page.

Start Page:

When you click into your review, the "Start Page" instructions will have updated for this part of the process.


To advance to the next step you can click the link in the workflow, or you can click the next button at the bottom of the page.

Goals:

On this page, you will add comments and adjust the slider to the relevant position.

Adding comments: you have multiple options, selecting the "Add Comment" Button or selecting the carrot, which allows two options, 1) linking a journal entry, or 2) uploading a file.
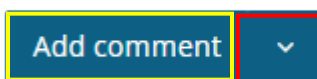
For each goal both the employee and supervisor will move the slider to the relevant position. It starts as "Not Rated" but once moving the slider the options will change to "Goal not started", "Goal in Progress", "Goal Moved" and "Goal Complete". Definitions below.

Megan Karbley

Not rated

TJ Bowie

Goal In Progress

Slider options with Definitions:

- Goal Not Started- The goal is/was still planned to happen this year but was not started.
- Goal In Progress- The goal is/was still intended to be completed; progress has been made.
- Goal Moved- The goal is no longer relevant to this review period; it will be completed during a different time period, or it will no longer be a goal.
- Goal Complete- The goal is sufficiently achieved.

Once you have completed this process for each goal, you will select the "Next" button.

Competency Assessment:

Start | Goals | Competency Assessment | Mid Year Check In (PILOT Group Only) | Next steps

NOTE: The "Summary: Competency Assessment" box below the instructions is intended to be a summary. You may use this text box for summarizing your thoughts about competency development overall, however you should add competency specific comments under each competency. Additionally, the sliders in the summary will update with the average from the individual competencies.

Adding comments: you have multiple options, selecting the "Add Comment" Button or selecting the carrot, which allows two options, 1) linking a journal entry, or 2) uploading a file.

Add comment ⌄

The rating scale for performance expectations under each competency is:

- **Exceeds Performance Standards:** An employee receiving an "Exceeds Performance Standards" rating demonstrates outstanding performance by consistently delivering exceptional results that go beyond the defined performance standards of their role. They contribute innovative ideas, take proactive steps to address challenges, and significantly impact the success of the department/division/university through their exceptional skills and dedication. This rating is reserved for those who consistently bring exceptional value above and beyond their job responsibilities.

- **Meets Performance Standards:** An employee receiving a "Meets Performance Standards " rating fulfills their job responsibilities and meets performance standards. They demonstrate a solid level of expertise for their role, contribute meaningfully to the success of the department/division/university, and perform at a level that aligns with the defined performance standards of their role. This rating is a positive acknowledgment of their ability to meet and often exceed the performance standards set for their position. For new employees, this rating indicates satisfactory progress and alignment with expected development milestones.

- **Below Performance Standards:** An employee receiving a "Below Performance Standards " rating has not met some of their job responsibilities and goals, and their performance in certain areas falls short of the defined performance standards of their role. They may require further development and improvement in specific aspects of their role, indicating a need for additional training, guidance, or skill development. For new employees, this rating underscores a learning curve as they acclimate to their role, with identified areas for growth and development. It highlights the necessity for targeted support and improvement to ensure they meet performance standards consistently and effectively contribute to the organization.

Megan Karbley

Not rated

TJ Bowie

Meets Performance Standards

The last competency "NCAA Compliance" is only applicable to some of our community; however, it does require a rating for all. If relevant to your work, please assess it as appropriate; and if not, please move the slider to "Meets performance Standards and acknowledge in the comments that this is not applicable to your work. This will not impact the overall summary rating in a material way. We are working on a system fix for this moving forward.

Once you have completed this process for each competency, you will select the "Next" button.

Mid-Year Check-In:
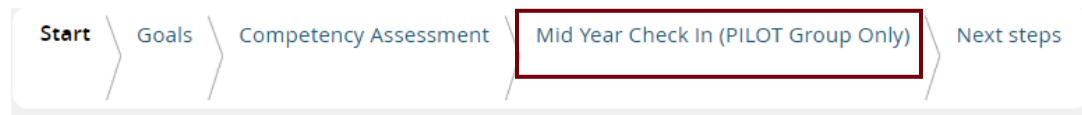
This section was intended for the Pilot Group only, so if you were a part of the pilot, you already completed this section, and if not, please select "Next" at the bottom to move on to the "Next Steps" screen.

Next Steps:

This page includes multiple important aspects.

1) It will list in red the items needed to still be completed for both the employee and the supervisor. You can click the wording in blue, and it will take you directly to the items still not completed.

> ⊗ Cannot progress review to next step, this will automatically occur on the 27 Jan 2025

> • Employee rating missing for "Accountability " under section "Competency Assessment"
> • Manager rating missing for "Accountability " under section "Competency Assessment" **Rate item**

2) This page will aggregate an overall rating, compiled from the average rating of the competencies.

Overall rating

⭐⭐⭐
Meets Performance Standards

3) On this page, both employees and supervisors (direct and one-level up) may add final comments to complete the review.

Final comments

Megan Karbley

No comments made

TJ Bowie

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Janet Williams

No comments made

Once you have completed all the items in red, there will be one left until January 26, 2025.

> ❗ Cannot progress review to next step, this will automatically occur on the 27 Jan 2025

On January 27th the review will move into the Supervisory Chain Review stage.

Supervisory Chain Review

During this portion of the review your departmental/divisional leadership will need to review the reports provided by Human Resources for all staff within their supervision and communicate necessary changes or affirm that you are approved to move forward to the Review Sign-Off. If any edits are needed, they must be completed prior to confirming this step is complete.

Before approving the review, ensure you have discussed the performance review with your respective staff members or supervisor. Please note that Approval of the review does not indicate acceptance. If you have questions, please contact your supervisor or HR representative. If there were any notable edits or changes made, supervisors will make sure to call attention to those so you can collaboratively discuss them.

Three people will need to approve the review, 1) the employee, 2) the supervisor, and 3) the 1-up supervisor.

This portion of the review is active until February 20, 2025. At this point the review will complete itself and be filed with Human Resources.

Staff with Faculty Rank

Create a goal and call it Staff With Faculty Rank. Then change the slider to complete, and upload the document there, putting in the comments, please see attached SWFR Unit I.