Conducting an Annual Review (for Employees)

How Does Your Annual Review Work?
You and your manager will use the online forms contained in myPerformance to document your performance outcomes and annual review discussion. In this guide, you will learn how to complete the form.

1. Getting Started
Your manager will let you know when it’s time to document your performance outcomes on the Annual Review Form and have a meeting. At that point, an **Annual Review Form** will be available for you to access in your myPerformance inbox.

To access the **Performance Form** for your annual review, follow these steps:
- Click **Home** in the upper left corner of the screen.
- Click **Performance Forms** from the drop down menu.
- Click the link to your **Annual Review Performance Form** from the list of forms.

**Please note:** you and your manager can both enter comments into the form, once it becomes available. If you and your manager try to access the form at the same time, you will receive a message to try again later.

2. Navigating the Annual Review Form
At the top of the form, you can see the major sections of the form (i.e., Route Map, Employee Information, Goals and Major Responsibilities, Core Values, Overall Comments, and Signatures). You can use these links to jump quickly down into a specific section of the form.

The “Route Map” shows the steps in the Annual Review process, as well as the step that you are currently in. This can be helpful if you’re not sure about the status of a form within myPerformance.
Next, you’ll see the form shows the employee information, which is populated automatically from SAP. If you see any errors, contact your HR Rep to have them corrected.

3. Adding Your Comments and Rating to the Annual Review Form

Assess your performance for the past performance cycle; scroll down in the form and enter your comments in the Comments on Goals and Major Responsibilities, Core Values, and/or Overall Comments sections. Cite your major accomplishments and goal outcomes.

If you want to edit or delete any of your goals, you can select the pencil or trashcan icons next to each goal title. You can also add a goal by selecting + Add Goal. You should always consult with your manager before changing any of the information related to your goals.

Select a rating for your Employee's Overall Self Rating at the bottom of the form; take into consideration what you were able to achieve (Goals and Major Responsibilities), how you were able to achieve it (Core Values), and your overall quality and quantity of work you had during the entire performance cycle.

Once you have completed your comments and rating, select Save and Close. Your manager will be able to see your comments and rating immediately and will have an opportunity to provide you with his or her annual review comments and rating on the same form.

4. Have an In Person One-on-one Meeting With Your Manager

Your manager is required to conduct an in person one-on-one meeting with you to discuss your goal outcomes and performance for the cycle; you will also receive feedback on areas that are going well or areas of concern or development.
5. **Review Manager’s Comments on the Annual Review Form**

Once this meeting has taken place, your manager will share his or her comments and rating with you - this will move the Annual Review Form to the Share Annual Comments and Rating stage in the Route Map.

Review your manager’s comments and rating and select **Save and Close** at the bottom of the form. This will let your manager know you have reviewed the comments and rating and will allow your manager to move the form to the Employee Signature stage in the Route Map.

6. **Apply Your Signature**

Once your manager has sent the form to you for your electronic signature, you will select **Apply Signature** at the bottom of the form. This will add your electronic signature and send the form to your manager for his or her electronic signature. Once you and your manager have both added your signatures, the Annual Review Form and process is completed.

*Remember that your signature does not imply agreement or disagreement.*

7. **Reviewing Completed Forms**

If you need to review any of your performance forms following submission, locate them by following this path:

- Click **Home** in the upper left corner of the screen.
- Click **Performance Forms** from the drop down menu.
- Click **Completed** to view a list of the forms that have been completed.
- Click the link to the Performance Form that you would like to review.

At this point, you cannot edit the ratings or comments in the form.