

## How Does the Annual Review Process Work?

You and your employees will use the online forms contained in myPerformance to document goal outcomes and the annual review discussion. In this guide, you will learn how to complete the form from a manager's perspective.

### 1. Getting Started

Please notify each of your employees when it's time for them to prepare for the Annual Review and the date you will meet to discuss their performance. At that point, each employee will enter comments into the Annual Review Form to report on goal outcomes. The Annual Review Form will be available from the myPerformance inbox.

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

To access the form, 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 employee's **Annual Review Form** from the list of forms.

**Please note:** You will be able to see the employee's comments only after the employee has chosen to send them to you by clicking **Share with Manager**. Your comments will be visible to the employee only after you choose to share them by clicking **Send to Employee for Review and Signature**.

### 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.

Next, you'll see a "Route Map" which 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.

Form Title	Employee	Step	Date Assigned	Step Due Date	Form Start Date
JHU 360 Multi-Rater for Edward Employee	Edward Employee	Employee Nominates Raters	12/05/2017		12/05/2017
FY18 JHU Annual Review for Edward Employee	Edward Employee	Employee Writes Comments and Rates	04/27/2018		07/01/2017

Back to: Inbox

FY18 JHU Annual Review for Edward Employee

Edward Employee

Route Map Employee Information Goals and Major Responsibilities Core Values Overall Comments Joint Commission and Other Requirements

Route Map

1 Employee Comments and Rating Complete 2 Manager Writes Comments and Rates 3 Employee Signature 4 Manager Signature 5 Completed

The form shows your employee's information, which is populated automatically from SAP. If you see any errors, contact your HR Rep to have them corrected.

### 3. Reviewing and Adding Comments and Rating to the Annual Review Form

Scroll down the form and review the employee's annual review comments in the Goals and Major Responsibilities, Core Values, and/or Overall Comments sections and the employee's overall self-rating at the bottom of the form. You will also **enter your comments** in the manager sections.

If you want to edit or delete any of the employee's goals, you can do so by selecting 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 the employee before changing any of the information related to his or her goals.

When you get to the bottom of the form, select an **overall rating** from 1 to 5 by selecting one of the circles. Enter your overall comments, and then click **Save and Close**, until you are ready to share your comments and rating.

You may add your comments and rating to the Annual Review Form at any time, even if your employee has not yet added his or her comments and rating.

### 4. Have an In Person One-on-One Meeting With Your Employee

Managers are required to **conduct an in person one-on-one meeting** with employees to review employee's comments and discuss goal outcomes. Conduct this meeting *before* finalizing and sharing your annual review comments and rating with the employee; your comments and rating may change based on information gathered from your employee during the annual review meeting.

### 5. Share Your Comments and Rating With Your Employee

Once you have met with your employee and you have finalized your comments and rating, scroll to the bottom of the form and select **Send to Employee for Review and Signature**.

**Employee Information**

First Name	Edward	Last Name	Employee
Position Title		Manager	Maggie Manager
Organizational Unit	10000007-Administration and Financial Services	Personnel Area	University Administration

**FY18 JHU Annual Review for Edward Employee**

Edward Employee

Route Map Employee Information Goals and Major Responsibilities Core Values Overall Comments Joint Commission and Other Requirements

**Goals and Major Responsibilities** + Add Goal

Goals

1.1 Team Goal SMART

1.2 Cross Training Administrative Staff  
Cross train all administrative staff on departmental processes by June 20XX.

**Comments on Goals and Major Responsibilities**

Maggie Manager:  
Edward, you have been very productive this year. You were very creative in cutting our supply budget - I appreciated your diligence in tracking our expenses. You also did an excellent job in cross training the administrative staff.

Edward Employee:  
I have been successful with these goals and met all of my deadlines.

**Employee's Overall Self-Rating**

Meets Expectations

**Manager's overall rating**

Above Expectations

**Overall Comments**

Please use this space to capture comments that support your overall rating.

Maggie Manager:  
The quality and quantity of work you display is consistently above expectations! Thank you for all of your hard work!

Edward Employee:  
I have had a very productive year!

Cancel Save and Close Send Back to Employee for Editing Send to Employee for Review and Signature

## 6. School of Medicine Annual Review Forms Only

On SOM Annual Review Forms, there is an additional Joint Commission and Other Requirements section to complete. Select yes, no, or N/A for each of the four statements that pertain to Joint Commission and other industry and departmental requirements.

## 7. Employee Reviews Manager Rating and Comments and Adds Signature

Once the employee has an opportunity to review your comments and overall rating, he or she will add an electronic signature. At that point, the form will be sent back to your inbox in myPerformance for your final review and signature.

*Remember an employee's signature does not imply agreement or disagreement.*

## 8. Signing the Performance Form

When you receive the Annual Review Form after the employee has signed it electronically, you will have one last opportunity to enter manager comments at the end of the form (although they are not required).

When you have finished, select **Sign to Complete Process** to complete the Annual Review process. After the form is signed, the performance form is no longer accessible in either your inbox or the employee's inbox within myPerformance.

\*NOTE: Your form will not be signed unless you select **Sign to Complete Process** again in the next confirmation screen. Once you confirm your signature, your role in the annual review process is complete. The form will be sent back to your manager for final review and is no longer accessible in your myPerformance inbox.

## Reviewing Completed Forms

If you want 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 or **All Forms** to view all in process or completed forms.
- 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.