

How Does the Annual Review Process Work?

You and your employees will use the online forms contained in myPerformance to conduct their annual reviews. In this guide, you will learn how to complete and submit the form from a manager's perspective.

Getting Started

The employee's Performance Form will remain in his or her inbox following the mid-year review meeting. The employee will initiate the annual review process by completing the **Performance Form** in myPerformance and sending it to you through the system. You will be alerted by email when one of your employees has completed this process. Continue to use this same form for the annual review.

*If you are supervising a JHHS employee with at least one direct report (including vacant positions), the form will be called "**Performance Form (Leadership)**". The form works the same, but includes Leadership Competencies rather than Major Responsibilities.*

Follow these steps to locate the form:

- 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 **Performance Form** from the list of forms. *Note that the form will not be available to you until after the employee has completed his or her self-evaluation.*

The screenshot shows the 'My Forms' dashboard. On the left is a navigation menu with options: All Forms, In Progress, Inbox, En Route, Completed, and Form Status. The main area displays a table of forms with columns: Form Title, Employee, Step, Date Assigned, Step Due Date, Form Start Date, Form End Date, Form Due Date, Last Modified, Sent From, and Action. Two forms are listed:

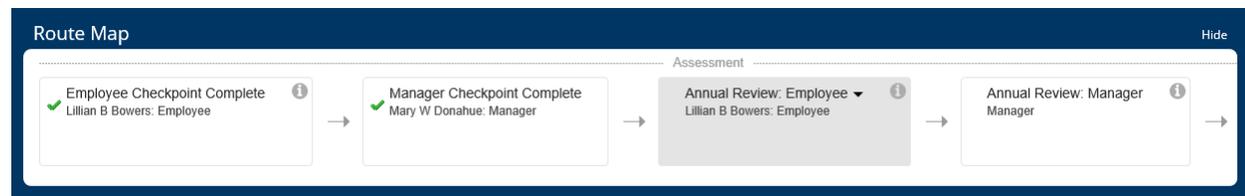
Form Title	Employee	Step	Date Assigned	Step Due Date	Form Start Date	Form End Date	Form Due Date	Last Modified	Sent From	Action
JHU Introductory Evaluation for Lillian B Bowers	Lillian B Bowers	Employee Signature	02/25/2015		01/01/2014	12/31/2014	03/10/2015	02/25/2015	Mary W Donahue	Info
FY16 JHU Performance Form for Lillian B Bowers	Lillian B Bowers	Annual Review: Employee	02/25/2015		07/01/2015	06/30/2016	06/30/2016	02/25/2015	Mary W Donahue	Info

Completing an Annual Review Performance Form

The top of the Performance Form shows the employee information, which is populated automatically from SAP. If you see any errors, contact HR to have them corrected.

Next, you'll see a "Route Map" which shows the steps in the performance 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.

The **Performance Form** is used for both the mid-year and annual review and it works the same for either. But, you should be aware of which review you are working on, and the Route Map is a great way to keep track.



JHU vs. JHHS Annual Review Process

JHU and JHHS have slightly different processes for performing reviews. The process for filling in the information in myPerformance is the same, but some of the weightings and other requirements vary. A summary of the differences is provided below.

If you are a JHU employee...

1. Ratings for “Goals and Major Responsibilities” account for 70% of your overall rating and ratings for “Core Values” accounts for 30%.
2. Leadership Competencies for JHU employees with two or more direct reports are built in to the “Core Values/Competencies” section of the Performance Form.
3. Comments are required for every goal under Goals, Major Responsibilities, and Core Values at both the mid-year checkpoint and annual review. Overall comments are optional.

If you are a JHHS employee...

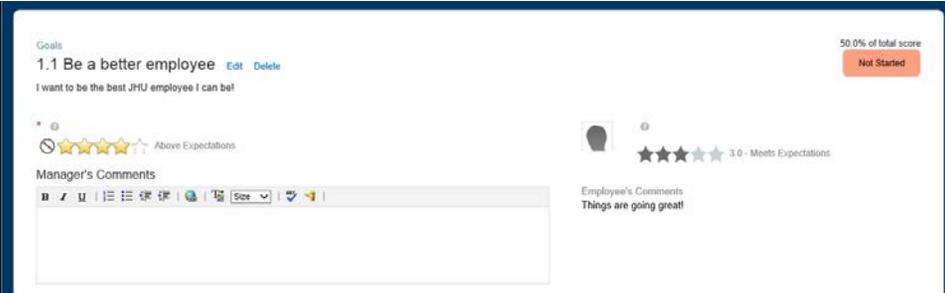
1. For most employees, the ratings for “Goals” account for 35%, “Major Responsibilities” account for 35%, and “Core Values” account for 30% of your overall rating.
2. Major Responsibilities are automatically pulled into the performance form based on DSM code, so they do not need to be entered.
3. Leadership Competencies for JHHS are included on a separate “Leadership” performance form. Leadership Competencies for supervisors with one or more direct reports replace Major Responsibilities. The total weighting for this section remains at 35%.
4. Your Job Description is linked to myPerformance and you can review it by clicking on the link under the “Job Description” header.
5. Comments are required for every goal under Goals. Comments are required when the employee is assigned a rating other than “3” for Major Responsibilities and Core Values. Overall comments are optional.

Completing the Performance Form

If you are supervising a JHU employee, you should meet with the employee to review his or her self-evaluation before entering your manager ratings and comments. This will give you information you need to complete the employee’s annual review.

When you are ready, complete the Performance Form by scrolling down the form, reviewing the employee’s annual review ratings and comments (located on the right side of the block), and entering your own ratings and comments where they are indicated in the form (recall that the requirement for comments is different for JHHS vs. JHU). Fields that are required are indicated by a red asterisk (*).

Note that Professional Development Goals are included in the Performance Form, but are not rated, and your comments do not contribute to the employee’s overall rating. These goals are intended to give the employee what he or she needs to develop in areas outside of goals, major responsibilities, and core values.



The screenshot displays a performance review interface. At the top, it shows 'Goals' with a sub-goal '1.1 Be a better employee' and options to 'Edit' or 'Delete'. Below this, the goal description reads 'I want to be the best JHU employee I can be!'. On the right, a progress indicator shows '50.0% of total score' and a 'Not Started' button. The goal is rated '3.0 - Meets Expectations' with three stars. The 'Manager's Comments' section is empty, while the 'Employee's Comments' section contains the text 'Things are going great!'. A rich text editor toolbar is visible above the manager's comments field.

If you want to edit or delete any of the employee's goals, you can do so by selecting **Edit** next to the goal title. Note that you should always consult with the employee before changing any of the information related to their goals.

Tracking Your Progress

After you begin to enter ratings, a header bar will appear, which shows a summary of your ratings for this employee. The header includes the following information (as shown in this example from left to right):

FY16 JHU Performance Form for Lillian Bowers

3.78 *0 # 1

0 1 4 2

- Overall Score:** In this example, 3.78 is the employee's overall score. It is calculated by averaging your ratings, using the weighting that is appropriate for this employee (i.e., JHU or JHHS weighting). If you click on the overall score, you will see a **Performance Summary** as shown to the right, which shows the details of this employees ratings.
- Incomplete Items:** This is the number of items in the form that have not yet been rated. In this example, all of the ratings have been completed and there are no incomplete items.
- Stack Ranker:** This value shows the employee's ranking among all of your direct reports. The employee in this example is ranked #1 among this manager's direct reports.
- Supporting:** This function is used to ask for feedback to support an employee's ratings. It is not currently used in the Johns Hopkins implementation of myPerformance.
- Gap Analysis:** The last box is the Gap Analysis. The numbers that appear show how many ratings the manager chose that were higher and lower than the employee. If you click on the box, you will see the complete Gap Analysis, as shown to the right. This shows the individual ratings and the gap between the manager and employee ratings.

Use all of these tools to track your progress on the individual employee's ratings as well as to be sure that you are assigning ratings that are appropriate in the context of your overall team and the individual employee's self-assessment.

FY16 JHU Performance Form for Lillian Bowers

3.78 *0 # 1

Overall Score

Performance Summary

Overall Form Rating: 3.78
Calculated Rating: 3.78

Section	Rating	Weight
Goals and Major Responsibilities	3.5	70%
By June 30, document all administrative procedures for my position in the case of absence.	4.0	35.0%
Develop Training	4.0	15.0%
Be a better employee	3.0	50.0%
Core Values	4.44	

for Lillian Bowers

1 0 1 4 2

Gap Analysis

4 items rated higher than Lillian

Goals and Major Responsibilities	Gap
By June 30, document all administrative...	+1.0
Core Values	Gap
Functional - Innovation	+2.0
Functional - Constructive engagement	+1.0
Core Value: Innovation and problem solv...	+1.0

2 items rated lower than Lillian

Core Values	Gap
Functional - Stewardship	N/A
Functional - Integrity	-2.0

Completing the Annual Review Performance Form

If you are supervising a JHHS or JHU SOM employee, you will need to complete the **Joint Commission Compliance** section. This section is required to assess whether the employee is in compliance with each of the Joint Commission requirements. You can select Yes or No for each compliance statement, or select N/A if the statement does not apply to this employee.

When you get to the bottom of the form, you will be able to see the mid-year comments from both the employee and the manager. The next steps are slightly different, depending on whether you are supervising a JHHS or JHU employee.

- **JHU Employees:** Select **Hold Annual Review Meeting** at the bottom of the form. JHU requires managers to confirm that they have met with their employees to discuss the ratings and comments before the annual review process is complete.

The performance form will stay in the manager's inbox until the 1:1 Meeting has been completed. After the meeting, you will return to the performance form, at which point you may choose to adjust some of your ratings based on your discussion with the employee.

At the conclusion of the the 1:1 meeting, ask the employee to review the performance form in a timely way and sign it electronically. Once the employee signs the form electronically, it will be routed back to your inbox in myPerformance.

When you are satisfied with your ratings and comments, select **Confirm 1:1 Meeting** at the bottom of the Performance Form. This sends the form back to the employee for one last review.

- **JHHS Employees:** JHHS managers are also required to meet with employees to review their ratings and comments. At the end of the Performance Form, you will in the date of the annual review meeting and enter in any overall comments. Then select **Send to Employee for Signature** to submit your ratings. The form will go back to the employee for one last review.

Joint Commission Compliance

In this section, you will assess whether the employee is in compliance with each of the Joint Commission requirements. Select Yes or No for each compliance statement. Select N/A if the statement does not apply. Hide Instruction

* Employee has completed all of the Joint Commission Requirements: Yes

* Employee has completed all of the Departmental Requirements: Yes

* Employee has all current Licenses and Certifications, as appropriate/required, and they have been primary sourced: Yes

Mid-Year Comments

Mid-Year Meeting Date: 2015-02-25

Mid-Year: Employee's Comments: I think things are going really well, and I'm looking forward to the rest of the year.

Mid-Year: Manager's Comments: Lillian is doing a great job, and is working hard to achieve her goals.

You may also: [Send to Previous Step Save and Close](#) [Cancel](#) [Hold Annual Review Meeting](#)

You may also: [Send to Previous Step Save and Close](#) [Cancel](#) [Confirm 1:1 Meeting](#)

Annual Review Overall Comments

Enter your overall comments for the annual review meeting. Hide Instruction

* Annual Review Meeting Date: 02/26/2015

Employee's Comments: I think I'm doing great this year.

Manager's Comments:
 Lily has been a great performer this year, and I am happy to give her a strong rating.

You may also: [Send to Previous Step Save and Close](#) [Cancel](#) [Send to Employee For Signature](#)

The Employee Reviews Your Ratings and Comments

At this point, the employee has one last opportunity to review your ratings and comments. He or she will see a **Performance Summary** at the bottom of the form that provides details regarding your individual ratings and how each rating is weighted to contribute to the employee's overall rating. The employee may not make any additional changes to the form at this point in the process.

If the employee is a JHU employee, he or she will have one last opportunity to enter comments at the bottom of the form

To complete the annual review process, the employee will select **Sign**. *The employee's signature does not imply agreement or disagreement.* At that point the form will be sent back to the manager's Inbox in myPerformance for final review and is no longer accessible to the employee.

Signing the Performance Form

When you receive the Performance 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).

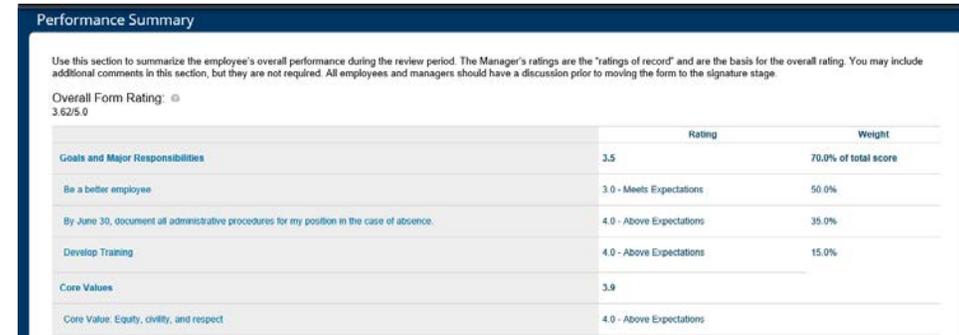
When you have finished, select **Sign** to complete the Annual Review process. After the form is signed, the performance form is no longer accessible in either your inbox or the employee's inbox within myPerformance.

Reviewing Completed Forms

If you need to review any performance forms following submission, located 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.

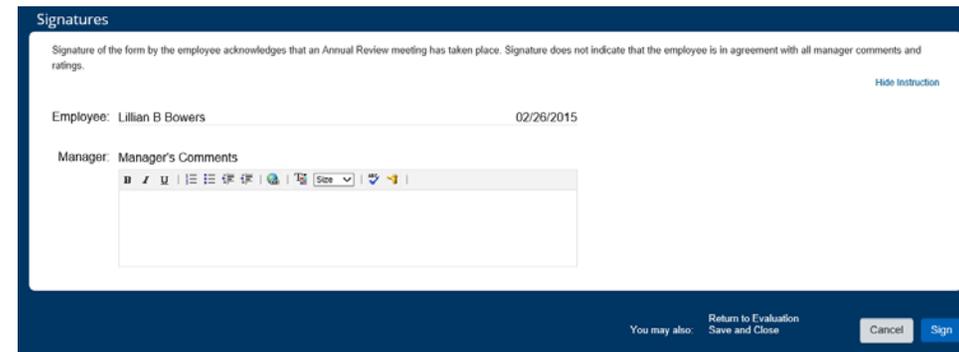


Performance Summary

Use this section to summarize the employee's overall performance during the review period. The Manager's ratings are the "ratings of record" and are the basis for the overall rating. You may include additional comments in this section, but they are not required. All employees and managers should have a discussion prior to moving the form to the signature stage.

Overall Form Rating: 3.62/5.0

	Rating	Weight
Goals and Major Responsibilities	3.5	70.0% of total score
Be a better employee	3.0 - Meets Expectations	50.0%
By June 30, document all administrative procedures for my position in the case of absence.	4.0 - Above Expectations	35.0%
Develop Training	4.0 - Above Expectations	15.0%
Core Values	3.9	
Core Value: Equity, civility, and respect	4.0 - Above Expectations	



Signatures

Signature of the form by the employee acknowledges that an Annual Review meeting has taken place. Signature does not indicate that the employee is in agreement with all manager comments and ratings. [Hide Instruction](#)

Employee: Lillian B Bowers 02/26/2015

Manager: Manager's Comments

You may also: [Return to Evaluation](#) [Save and Close](#) [Cancel](#) [Sign](#)