

## **ePerformance Desk Reference**

### **Performance Management Manager Overview**

The ePerformance Desk Reference: Performance Management Manager Overview is designed to give managers an overview of how to complete a performance review using a simple six-step process. Each step shows you how to navigate through the process so you can complete a performance review. Help links are provided throughout the performance review document itself if you need assistance while you are completing the review.

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1. **Notification:** Managers will receive a My HUB alert 45 days in advance of the employee's review date.
  - [Click here](#) for a recommended time line and checklist for completing the review on time.

2. **Preparation:** The manager will then prepare the information to review.

#### **Create the performance review document for the employee.**

##### **Navigation**

- [My HUB: Manager Homepage] > Begin Performance Review / Merit Increase > Continue
- Select employee > Continue
- Select the template (Employee or Manager) > Create Documents

**Transfer Document:** Option for the manager to transfer completion of the employee's evaluation to someone else. Select the Transfer Document link on the Performance Management Home page to begin.

**Establish Criteria:** Establish the evaluation criteria, including goals and objectives, job responsibilities, and systemwide values

##### **Navigation**

- Current Documents > Select employee
- Establish Evaluation Criteria – Start
- Define the goals and responsibilities by clicking Add, Delete or Edit Details
- Click Complete when finished.
- Alert will go to employee to complete self-evaluation.

3. **Gather Review Information:** Managers and employees will work collaboratively to ask for feedback from others, including managers, peers, and other reviewers.
  - Manager will nominate peer reviewers.
  - Peer reviewers will complete their reviews.
  - Employees will be given the option to complete a self-evaluation.
  - Managers will be able to review peer evaluations.
  - Managers will be able to review self-evaluations.
  - Managers also can use the Transfer Document feature to temporarily transfer completion of an employee's review to someone else. [Click here](#) for additional information about this feature.

## **Nominate Participants for Peer Evaluations**

### **Navigation**

- Current Documents > Select employee
- Nominate Peer Reviewers – Start
- Click the Add Peer link for the type of review the nominee will use to provide feedback.
- Search for the nominee by first and/or last name. Check the box to the left of the name. Click OK.
- Click Submit when finished.
- Alerts will go to nominees to complete evaluations.

## **View Self- and Participant Evaluations**

### **Navigation**

- Current Documents > Select employee
- View Peer Evaluations – View
- View Self-Evaluation – View

#### **4. Complete Review Online:**

- Managers will then complete all sections of the review online.
- Managers will determine and submit the employee's merit increase based on the established merit guidelines.

## **Complete Manager Evaluation**

### **Navigation**

- Current Documents > Select employee
- Complete Manager Evaluation – Start
- Enter review ratings and comments.
- Click Save when finished.

## **Enter Merit Score**

### **Navigation**

- While still on the Complete Manager Evaluation page click on Submit for Approval.
- Follow the five-step process for entering a merit recommendation.
- Once submitted, the merit recommendation along with the performance document will be sent to the first approver.

5. **Approvals:** The completed review and merit recommendation are then submitted through the review and approval process.

## **Approvers Review Merit and Performance Document**

### **Navigation (for Reviewer)**

- [My HUB: Manager Homepage] > Worklist > Select Employee
- View Performance Document and Enter Comment
- Close Performance Document and click Approve when finished.
- Once submitted, the merit recommendation along with the performance document will be sent to the next approver.

### **Review Is Approved**

- Once the final approver approves the review, the manager will receive email notification.
- By default, the review will only be visible to those in the approval process at the time they are to review and approve the document. However, either the manager or approver can click Forward Review on the review document to send a view-only version of the review to someone else within the employee's reporting structure.

6. **Conduct Review Meeting and Finalize Review**: The final step is for managers to notify staff of the scheduled review date and meet with them to discuss the review. Once the review is complete, it is date-stamped and processed through My HUB and stored online.

### **Make Review Document Available to Employee through My HUB**

#### **Navigation**

- Current Documents > Select employee
- Complete Manager Evaluation – Edit
- Click Available for Review.
- Employee will receive an email and alert prompting the employee to acknowledge/sign off on the review document once the review meeting has been held.

### **Conduct Review Meeting with Employee**

- Remind employee to acknowledge the review through My HUB once the review meeting has been held.
- When acknowledged, an email will be sent to the manager indicating that the review has been signed off.

### **Complete the Review**

#### **Navigation**

- Current Documents > Select employee
- Complete Manager Evaluation – View
- Click Complete.
- Document is finalized and the merit increase is automatically submitted for processing into the HR system.