

Newer University-Wide Goals-Mid-Annual Review Form

Manager View of Form:

Instructions:

Performance Process
Annual Review Re

Steps and Tasks

Paul Nash
Annual Review
07/12/2018 - 06/30/2019

- Reviewers
Due Date 05/01/2019
- Feedback Reviews
Due Date 05/31/2019
- Self Evaluation
Due Date 05/31/2019
- Manager's Evaluation**
Due Date 06/30/2019

Open Document

Pending Acknowledgement

Manager Evaluation - Update and Share

Paul Nash

| | |
|---|--------------------------------|
| Job Code Description IT Info Security Professnl V | Manager Nathan Hall |
| Document Type Annual Review | Period 07/12/2018 - 06/30/2019 |
| Template FY19-Goals-Mid-Annual-Form | Document ID 1087922 |
| Status Evaluation in Progress | Due Date 06/30/2019 |

Long Format

Instructions
Goals
Mid-Year
Annual
Competencies
Feedback

Instructions

This document is designed to capture key highlights of your ongoing conversations with your employee during the current period. Your school or unit will provide guidance on which sections to complete and when.

Information is provided on the purpose of each section after clicking on the section's tab.

Enter your comments in the appropriate sections. When you are ready to share your comments or complete your evaluation, you may do so by selecting the appropriate button. You can start or stop sharing at any time. You are encouraged to discuss with your employee, in advance, if you will share your comments.

Save - Save your work often by clicking on the Save Button.

Start Sharing - All comments on your document below become visible to your Employee. Your Employee will continue to see your changes whenever you update and save your document.

Stop Sharing - Your comments will no longer be visible to your Employee until you Start Sharing again.

Complete Annual - This completes the Annual Review and shares your comments *and Overall Rating* with your Employee. No further changes/updates can be made after completing the document. Click this button at the end of the annual review period.

Attachments can be added by clicking on the **Add Attachment** link below. Only Managers can add attachments to performance documents. Your employee will not be able to view any attachments until after you click on the Complete Annual button.

Attachments

No Attachments have been added to this document

[+ Add Attachment](#)

Goals:

Annual Review
Return

Manager Evaluation - Update and Share

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Long Format

Instructions
Goals
Mid-Year
Annual
Competencies
Feedback

Goals

Use this space to document your conversation with your employee about their goals or priorities, and professional development for the current performance period. Include notes on the intended impact of their work. If applicable, use the separate "Competencies" tab to identify and share with your employee the competencies you discussed with them as being important to how they do their work.

Goals Summary

Manager Comments

Writing Tools

Employee Comments

Your Employee has not shared their comments

Attachments

No Attachments have been added to this document

Mid-Year:

Manager Evaluation - Update and Share

Paul Nash

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 Template FY19-Goals-Mid-Annual-Form
 Status Evaluation in Progress

Manager Nathan Hall
 Period 07/12/2018 - 06/30/2019
 Document ID 1087922
 Due Date 06/30/2019

Long Format

Instructions | Goals | **Mid-Year** | Annual | Competencies | Feedback

▼ Mid-Year

Use this space as frequently as you wish to document ongoing discussions with your employee about the progress they have made on their goals or priorities, and professional development. Note where new challenges or opportunities have shifted your goals or priorities or professional development.

Mid-Year Summary

Manager Comments

Writing Tools

Employee Comments

Your Employee has not shared their comments

Annual:

Long Format

Instructions | Goals | Mid-Year | **Annual** | Competencies | Feedback

▼ Overall Summary

Use this space to document your conversation with your employee about the impact they have had during this performance period, including how their work has contributed to the success of your organization. Note what they have accomplished, how they approached their work, and professional development progress for this current period.

After you have entered comments and selected a rating, you can complete the Annual Review by clicking on the **Complete Annual** button at the top right.

Rating

Manager Comments

Writing Tools

Employee Comments

Your Employee has not shared their comments

Competencies (I added a few so you can see what it looks like populated):

 Long Format



Instructions | Goals | Mid-Year | Annual | **Competencies** | Feedback

▼ Competencies (Optional)

Click on the "Add" link below to add Employee Competencies. The competencies listed are those that you and your employee discussed as being important to how they do their work during the current performance period. Competencies can only be added to the Manager Evaluation form. You and Paul Nash should meet and discuss Competencies prior to adding them to the form.

To review the competency definitions, click on [Competency Dictionary](#).

 Expand |  Collapse |  Add a Competency

| | |
|--|-------------------|
| ▼ Building Partnerships | |
| Description : Identifies opportunities and takes action to build strategic relationships between one's area and other areas, teams, departments, units, or organizations to help achieve business goals.  | |
| <hr/> | |
| Created By Nathan Hall | 08/24/2018 2:31PM |
| ▼ Continuous Learning | |
| Description : Actively identifies new areas for learning; regularly creates and takes advantage of learning opportunities; uses newly gained knowledge and skills on the job and learns through their application.  | |
| <hr/> | |
| Created By Nathan Hall | 08/24/2018 2:31PM |

Attachments

No Attachments have been added to this document

 Add Attachment

Feedback:

Instructions | Goals | Mid-Year | Annual | Competencies | **Feedback**

▼ Feedback from all Reviewers (Optional)

Comments from *completed* feedback reviews are displayed below.

Please provide a **meaningful summary** of the feedback you received this year about Paul Nash in the comments section of the appropriate tab. Make sure not to share comments exactly as they were written by other reviewers.

Click **Expand** to view the feedback.

 Expand |  Collapse

| | |
|---|-------------------|
| ▼ Context and Impact of Work | |
| Description : Over the past year, in what context did you work with this person, and what behaviors did this person demonstrate that positively impacted you and your organization? | |
| <hr/> | |
| Created By Template | 08/23/2018 5:16PM |
| ▼ Opportunities for Improvement | |
| Description : In the spirit of continuous improvement, what could this person have done differently or better to be more effective in their work with you? | |
| <hr/> | |
| Created By Template | 08/23/2018 5:16PM |
| ▼ Demonstration of Team/Org values | |
| Description : How has this person modeled their team/organization values this year (if applicable)? | |
| <hr/> | |
| Created By Template | 08/23/2018 5:16PM |

Attachments

No Attachments have been added to this document

 Add Attachment

Employee view of Form:

Instructions:

Annual Review

Self-Evaluation - Update and Complete

Paul Nash

| | |
|--|---------------------------------------|
| Job Code Description IT Info Security Professnl V | Manager Nathan Hall |
| Document Type Annual Review | Period 07/12/2018 - 06/30/2019 |
| Template FY19-Goals-Mid-Annual-Form | Document ID 1087922 |
| Status Evaluation in Progress | Due Date 05/31/2019 |

Long Format

Instructions | Goals | Mid-Year | Annual | Competencies | Feedback

▼ **Instructions**

This document is designed to capture key highlights of your ongoing conversations with your manager during the current period. Your school or unit will provide guidance on which sections to complete and when.

Information is provided on the purpose of each section after clicking on the section's tab.

Enter your comments in the appropriate sections. When you are ready to share your comments or complete your self-evaluation, you may do so by selecting the appropriate button. You can start or stop sharing at any time. You are encouraged to discuss with your manager, in advance, if you will share your comments.

Save - Save your work often by clicking on the Save Button.

Start Sharing - All comments on your document below become visible to your Manager. Your Manager will continue to see your changes whenever you update and save your document.

Stop Sharing - Your comments will no longer be visible to your Manager until you Start Sharing again.

Complete Annual - This completes your Self Evaluation and shares your comments with your manager. No further changes/updates can be made after completing your document. Click this button at the end of the annual review period.

To notify your Manager that you updated this document, click on the **Notify link** on the top right to send your Manager an automated email with a link to this document.

Goals:

Long Format

Instructions | **Goals** | Mid-Year | Annual | Competencies | Feedback

▼ **Goals**

Use this space to document your conversation with your manager about your goals or priorities, and professional development areas of focus for the current performance period. Include notes on the intended impact of your work. If applicable, use the separate "Competencies" tab to review the specific competencies you will focus on as discussed with your manager.

Goals Summary

| | |
|--------------------------|--|
| Employee Comments | Writing Tools |
| Manager Comments | Your Manager has not shared their comments |

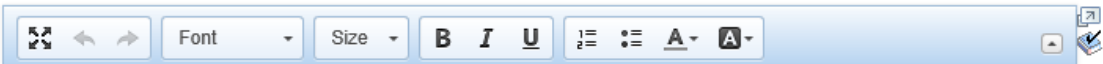
Mid-Year:

Instructions Goals **Mid-Year** Annual Competencies Feedback

▼ Mid-Year

Use this space as frequently as you wish to document discussions with your manager about progress you have made on your goals or priorities, and professional development. Note where new challenges or opportunities have shifted your goals or priorities or professional development.

Mid-Year Summary

| | |
|-------------------|--|
| Employee Comments |  |
| Manager Comments | Your Manager has not shared their comments |

Annual:

Instructions Goals Mid-Year **Annual** Competencies Feedback

▼ Overall Summary

Use this space to document your conversation with your manager about the impact you have had, including contributions to your team/department, during this performance period. Include what you have accomplished and how you have approached completing your goals or priorities, and professional development areas and progress.

When you have completed your self evaluation, click on the **Complete Annual** button at the top right.

| | |
|-------------------|--|
| Employee Comments |  |
| Manager Comments | Your Manager has not shared their comments |

Competencies:

Instructions | Goals | Mid-Year | Annual | **Competencies** | Feedback

▼ Competencies (Optional)

You and your Manager should meet and discuss which competencies should be added for the current performance cycle. Competencies are added to the Manager Evaluation only.

To review the competency definitions, click on [Competency Dictionary](#).

▼ Audit History

| | |
|----------------------------|----------------------|
| Created By Anna Wong | 08/23/2018 5:16:35PM |
| Last Modified By Paul Nash | 08/23/2018 5:17:09PM |

Feedback:

Instructions | Goals | Mid-Year | Annual | Competencies | **Feedback**

▼ Feedback from all Reviewers (Optional)

To select reviewers, click on the *Reviewers* link in the Steps and Tasks panel on the left. After selecting reviewers, click on the **Notify** link in the top right to send your Manager an automated email requesting reviewer approval.

All feedback reviewers are asked the questions below. Completed feedback reviews are visible only to your Manager.

▼ Expand | ► Collapse

▶ **Context and Impact of Work**

▶ **Opportunities for Improvement**

▶ **Demonstration of Team/Org values**

▼ Audit History

| | |
|----------------------------|----------------------|
| Created By Anna Wong | 08/23/2018 5:16:35PM |
| Last Modified By Paul Nash | 08/23/2018 5:17:09PM |

FY20 Performance Management Instructions List and Visual Diagram

- Initial FY20 Manager and Employee Conversation
- Employee Documents Goals and/or Priorities in PeopleSoft
- Employee shares document with manager (optional)
- Manager reviews and adds comments under Goals
- Manager shares document with employee (optional)
- Mid-Year/Ongoing Conversation: Manager and employee meet as often as they choose to discuss responsibilities and needs
- Employee uses Mid-Year or Ongoing Conversation tab to document discussions with manager as they choose. May also formally provide mid-year comments based on school/unit direction
- Manager uses Mid-Year or Ongoing Conversation tab to document discussions with employee as they choose. May also formally provide mid-year comments based on school/unit direction
- Employee selects feedback reviewers, if applicable. Reviewers may be nominated at any time
- Manager nominates and invites reviewers to provide feedback for respective employees
- End of year, or end of review period, "Annual" Manager and Employee conversation
- Employee documents highlights from conversation about performance, impact, and professional development. Employee completes self-evaluation
- Manager documents highlights from conversation about the employee's overall performance, impact, and professional development. Selects overall rating. Manager completes annual review
- Employee acknowledges review. This completes the annual review process in PeopleSoft



Feedback can be gathered at any time and more than once during the year.

Use of Competencies, Conducting Formal Mid-Year Discussions, and Soliciting Feedback are determined by School/Unit