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Performance Review

Performance Review Introduction
Please do not confuse your Goal Plan with your Performance Review.

The Goal Plan – The ongoing process of creating measurable goals and/or projects that are regularly reviewed and with progress and/or accomplishments notated.

The Performance Review – An annual event where both the employee and supervisor review the Goal Plan and comment on the past year’s progress, growth, and accomplishments.

When to Start, How to Open
You should not work on or enter comments in your Performance Review until you are notified by your supervisor or HR Representative to start the review process. Your Performance Review is a ‘living’ document that changes as you edit goals, update your status, or add comments to your Goal Plan. Your Goal Plan is something you should visit regularly and update, while your Performance Review is more of a summary of the year’s achievements.

To open your Performance Review click on the “Performance Review” link on the My UI Career homepage.

You can also open your performance review using the pull down menu under Home and select the Performance link.

Either method will open a page that lists your current and past performance reviews completed in My UI Career.

In coming years as you complete more reviews in My UI Career you will be able to return to past performance reviews. To open your performance review, click on the link under Form Title.
The Performance Review Process

Before proceeding on how to complete your performance review, we will look at the actual process and how to successfully complete a review.

Near the top of your performance review page you will find the Route Map for your performance review and is divided into three parts:

- Assessment
- Signature
- Completed

Assessment

The first part is Assessment, which consists of you and your supervisor adding, editing, and reviewing comments before meeting to discuss your performance review.

The Self-Evaluation is your opportunity to provide comments and information about your performance. While you are working on your Self-Evaluation your supervisor is unable to read any of your comments. Once you have completed the Self-Evaluation you can forward the form to your supervisor using the pull down menu and clicking “Send to Supervisor”.

Clicking “Send to Supervisor” does not immediately forward the review. A new screen will open to confirm sending the review to your supervisor or canceling and returning to the review.
When you send your performance review to your supervisor you will not be able to make any edits to the review while the review is with the supervisor. If your supervisor would like to edit your review or has suggestions about your comments, your supervisor can send the performance review back to you. Once received you will be able to edit or make changes.

In the Assessment part of the performance review process the actual review form can be sent back and forth between the staff member and the supervisor until the document is completed to all parties’ satisfaction.

The final step in Assessment is for the staff member and their supervisor to meet and discuss the Universal Competencies, the progress or status of the current year goals, and the goals for the upcoming year.

**Signature**

The second part of the performance review if for the employee to sign the review to indicate a performance review meeting and discussion has taken place.

**Completed**

Once the performance review has been signed the form is complete. However the overall review process continues starting with the goals created for the new review period starting with the regular updating of progress on the goals in the goal plan.
Completing the Performance Review Form

The remainder of these instructions are focused on the step-by-step procedures used in completing the Performance Review form.

Universal Competencies

The Universal Competences listed here are the competencies for your job classification as listed in Self-Service and in your ePersonnel file.

<table>
<thead>
<tr>
<th>Universal Competencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Universal Competencies apply to all University staff jobs. A writing assistant is available</td>
</tr>
</tbody>
</table>

Each competency is displayed with a performance level. In the example shown below the universal competency is “Collaborating and Embracing Diversity” and the performance level is “Working”.

<table>
<thead>
<tr>
<th>Collaboration and Embracing Diversity - Working</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ability to work with a variety of individuals and groups in a constructive and civil manner while appreciating varied cultures, race, creed, color, national origin, age, sex, disability, sexual orientation, and gender identity. Feedback is received, professionally and respectfully. Models open, respectful, accepting, and maintains productive work relationships while considering multiple perspectives and using effective communication with individuals of diverse backgrounds.</td>
</tr>
</tbody>
</table>

While these competencies and performance levels can be edited, no changes should be made without consulting with your supervisor to find out the division, college, or organization policies on Universal Competencies.

Comments, Universal Competencies

Your performance review is your opportunity to reflect on the past year and to provide your insight on the year’s events, activities, and progress by providing comments.

<table>
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</tr>
</thead>
<tbody>
<tr>
<td>Ability to work with a variety of individuals and groups in a constructive and civil manner while appreciating varied cultures, race, creed, color, national origin, age, sex, disability, sexual orientation, and gender identity. Feedback is received, professionally and respectfully. Models open, respectful, accepting, and maintains productive work relationships while considering multiple perspectives and using effective communication with individuals of diverse backgrounds.</td>
</tr>
</tbody>
</table>

For Universal Competencies you can enter your comments directly in the comments box. Your comments should be more than “I met this goal/competency”. For example, the displayed competency above is Collaboration and Embracing Diversity. You need to clearly state how you met a goal or competency, such as “Over the past year I have consistently created diverse workgroups to address...”
You can also provide examples or highlight instances where you have met or exceeded the stated goal or competency. An example could be, "The committee I created in November to review the new policies worked together to solicit diverse points of view …"

**Writing Assistant**

To be honest it can be a challenge to write comments, but if your click on Writing Assistant you can find guidance and ideas on how to write comments.

The Writing Assistant can provide you with "snippets" or short comments that you can edit and revise to suit your situation.

The top third of the Writing Assistant provides descriptions for the competency. You may need to scroll down to read all of the descriptions or examples the assistant provides.

Collaboration and Embracing Diversity - Working
Ability to work with a variety of individuals and groups in a constructive and civil manner while appreciating the unique contribution of individuals from varied cultures, race, creed, color, national origin, age, sex, disability, sexual orientation, and gender identity. Shares appropriate information/feedback openly.

The middle section of the assistant has topics that are arranged by your view of how you relate to the competency. You may feel there is a need to improve how you are achieving the competency, or that you are meeting the competency, or that you exceed in meeting a competency. You may need to scroll through the topics to find the best fit.
When you click on a topic a preview of the quote appears in the bottom third of the assistant.

You cannot edit the quote on this page but if you click on the Place Quote button in the lower right of the assistant, the quote will be placed in comments box in your performance review.

In the performance review comments section you can edit the quote to fit your needs.

You are not limited to picking just one quote. It is entirely possible for you to identify where you need specific improvement in meeting part of a competency while exceeding in another area of it. When you click on a topic you can see the preview of the quote. The quote will not appear in your comments until you click on the Place Quote button.

**Give Advice**

In addition to the Preview Quote under the “Describe Behavior” tab, there is a “Give Advice” tab. This is more of a supervisor’s tool to assist in writing feedback, but it is also open to staff to use to help develop comments on how they plan to address performance.
Accomplishments
The intent of the Goal Plan is that you write the goals for the coming year then regularly revisit your goal plan to see how you are progressing. You can access your Goal Plan at any time to add new projects or goals or add comments about how you are doing on existing goals. The comments about goals could be meeting a deadline, hitting a milestone or making a notation of an obstacle that is hindering your progress. The result of revisiting your Goal Plan and making comments is that you are capturing information during the year that you can use when you write your summary comments in your Performance Review. When you first view a goal in your performance review you will see the goal and the basic information you entered when you and your supervisor created the goal.

Comments
Enter your summary comments in the comment entry box. Please keep in mind that this is a summary of your accomplishments in meeting the goal over past year.

To access the comments you made during the past year about the goal, click on the additional goal information to the immediate lower right of the comment box. Two tabs will appear, Goal Details and Other Details.
Other Details
If in your Goal Plan you entered an Action Plan and/or entered comments under Goal Progress, the action plan steps and your comments will be displayed under Other Details.

This is a very important resource for writing your summary comments. Rather than trying to remember what you did and when, the date and accomplishment or notation about a goal is at your fingertips. The comments you made on a goal are not automatically copied in your Performance Review comments, but you can highlight and copy and paste a goal comment in your performance review.

Section Comments
Up until this point you have been providing summary comments for specific competencies and goals.

There is the chance that the competencies and goals did not capture all of your accomplishments during the review period. The Section Comments is your opportunity to reflect back on the year and highlight other accomplishments, awards, meaningful collaborations, or anything that you believe accurately reflects your efforts.
Completing Review
You will need to repeat this process of commenting on your competencies and goals until you have made all of your summary comments. However, you are not finished with your performance review until you have added your goals for the coming year. To do this all you need to do is click the Add Goal link at the right edge of the bar and enter goals just as you did for the current year.

If you have a goal that spans multiple years you can also use the Copy Goal function and copy a goal from a previous goal plan into the new goal plan.

Take Your Time (Saving & Forwarding)
Writing your comments for your performance review isn’t something you should rush through. You should review the comments that you and your supervisor have entered in your goal plan and reflect on your accomplishments. If during the year you have regularly reviewed and commented on your goals, then your summary comments should be rich with details. With that in mind, you don’t need to complete your performance review in one sitting. At the bottom of the performance review you have a few options:

- **Save and Close** allows you to save your work and return at any time. When you click on Save and Close you are returned to My Forms where you can access your and open your review later to continue working on it.

If you click on Cancel the form is closed and none of your work is saved.

If you have completed your performance review you can forward it to your supervisor by clicking on the Send to Supervisor. Remember, you can also send it using the Self Evaluation pull down menu from the Route Map.

Employee Acknowledgement
After working with your supervisor to complete the review form and after meeting with your supervisor to discuss your performance review and create the upcoming review period goals, your supervisor will return the performance review to you for your signature.
To sign the Performance Review use the pull down menu next to Employee Acknowledgement and select Sign. Selecting Sign will not immediately sign and complete your review form.

An intermediate screen will open to confirm you want to sign and gives you the chance to cancel and return to the form. If you click on the Sign button the completed Performance Review form will be closed and sent to your completed inbox in My Forms.

Performance Review, Supervisor’s View

Open a Review
Once a staff member has been asked to complete their performance review and sent the form to their supervisor two actions are triggered:

1. The performance review is forwarded and can no longer be edited by the staff member
2. The supervisor is notified the performance review has been sent
To access a performance review the supervisor has a couple of options. From the home page in My UI Career, under Supervisor Tools click on either the “My Team Overview” or “Performance Review Forms” link.

If you select My Team Overview you can see your complete team, access or request feedback from others, and see the current status of reviews.

<table>
<thead>
<tr>
<th>My Team -</th>
<th>Feedback from Others</th>
<th>Self Evaluation</th>
<th>Discussion/Feedback Form</th>
<th>Discussion/Feedback Form</th>
<th>Signatures</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Image]</td>
<td></td>
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</table>

**Feedback**
While you are in the Team View you can also ask for feedback from people who know and/or interact with the person who is being reviewed. To start, click on the Ask for Feedback button.

You can request feedback from other staff members by clicking on their icon or directly enter an email address.

When you click on the Send email button an email with the employee’s name, your expectations for the feedback, and a deadline is emailed to the people whom you listed.
**Discussion/Finalize Form**
Clicking on the review button under Discussion/Finalize Form opens the Performance Review form.

As a general rule you would not add your comments until the employee has finished the Self Evaluation. They may require you sending the form back to your staff member for edits or revisions. Once all of the edits have been completed and you have added your comments to an employee’s annual review you will need to schedule a meeting with the employee to go over both your and your employee’s comments.

**Performance Review Forms**
Another way to access review forms is to click on the Performance Review Forms under Supervisor Tools.

A list of forms will open and you can select which form to open by clicking on the Form Title.

The main difference between the two methods is that the My Team Overview also offers you access to soliciting feedback form others.

**Performance Review Page**
Whether you select an employee to review from your To Do tile or click on the Review button found on the Performance page, the Annual Performance Review for the person you selected will open. You will need to scroll down the page to rate and add comments to the Universal Competencies and Goals/Accomplishments.

The Annual Performance Review page can be divided into six sections:

- Route Map
- Universal Competencies
- Goals/Accomplishments
- Section Comments
- Performance Summary
- Next Year’s Goal Plan
Route Map
The first segment of a performance review displays the Route Map. The shaded box indicates where the form is in the review process. In this instance the form is with the supervisor for the discussion or finalization step. At the step the supervisor can return the form to the employee for further edits, changes, additions, or other issues to assure the form is complete.

Universal Competencies
The next segment concentrates on Universal Competencies. These competencies and level of the competency should be consistent with the local job description.

Competency Level
In the example above, the competency is Collaboration and Embracing Diversity and the level of the competency is Working. There are four levels for every competency; basic, working, extensive, and expert/leader. As a supervisor you can adjust the level to reflect the specific circumstance. However, you can only move up or down one level during any given review.

Staff Comments
As a supervisor, you should look at the performance review after the employee has added his or her comments. Employee comments are found in the lower right hand corner for each competency and goal/accomplishment.
Rating Scale

When reviewing Universal Competencies you are required to provide a rating, as indicated by the red asterisk (*). If you need a quick review of the rating scale (Improvement Needed, Effective, Commendable, and Distinguished), you can click on the question mark icon and the scale will be displayed.

Competency Scale 4

1.0 **Continuing to Develop (Improvement Needed)**: Continuing to Develop (Improvement Needed) - Does not consistently demonstrate the relevant typical behaviors associated with the proficiency levels assigned for the classification or specific role. Needs additional time to fully master the behaviors at the required proficiency level but quality/quantity of work performance may or may not be significantly affected.

2.0 **Competent (Effective)**: Competent (Effective) - Often demonstrates competence in the majority of the relevant typical behaviors associated with the proficiency level assigned for the classification or specific role. Demonstrated competence contributes to the quality/quantity of work performance.

3.0 **Accomplished (Commendable)**: Accomplished (Commendable) - Consistently demonstrates competence in all of the relevant typical behaviors associated with the proficiency level assigned for the classification or specific role. Higher level of competence contributes to the quality/quantity of work performance.

4.0 **Advanced (Distinguished)**: Advanced (Distinguished) - Consistently demonstrates competence in most of the relevant typical behaviors associated with a higher proficiency level than what is assigned for the classification or specific role. Advanced level of competency contributes to the quality/quantity of work performance.

Supervisor Comment

To enter your comments, click on the area for your comments and the text input box will open.

The best practice in writing comments is to first read the employee comments and base your comments on those and your personal observation. At times, finding the right words can be time consuming. Prompts for comments appear when you click on the Writing Assistant button.
**Writing Assistant**

The Writing Assistant provides brief comments that you can insert and edit in your own comments. These comments are specific to the competency and level.

To use a comment, first select a comment snippet.

The complete comment is displayed in the lower portion of the dialog box.

You can select how the comment is phrased by either selecting the staff members name to be displayed or use “you” in place of the staff member’s proper name. In the example above John would be used in the text.

To place the comment you selected in your comments, click on the Place Quote button

The Writing Assistant can also provide prompts for giving advice when needed. Click on the Give Advice tab to view the advice prompts and if you find one that suits your purpose, click on the Place Quote button to the right of the quote to place it in your comments.
Edit Comments
You can type your comments directly in the comment box, place and edit quotes from the Writing Assistant, or work on your comments offline in a word processing program and then copy and paste them into the comment box.

The comment box has some simple tools for fonts, bullet lists, web links, spell check, and legal scan.

Legal scan is a quick review of the terms used in comments. Terms that could cause concerns are highlighted and brought to your attention. This is not a substitute for General Council, but is intended to avoid unnecessary complications.

Goals/Accomplishments
Once you have filled in the rating scale and comments for the Universal Competencies next comes the goals and accomplishments. Unlike Universal Competencies where you had to complete a rating and comment for each competency, in Goals and Accomplishments you only required to provide comments.
Staff Comments
Just as with Universal Competencies, the best practice is to first read the employee comments and base your comments on the employee comments and your personal observation. However in Goals and Accomplishments there can be additional information beyond the staff member’s comments.

When you click on a goal the staff members comments expand so you can review various aspects of the goal. Others’ Ratings are your employee’s comments about that specific goal.

The Goals Details tab will display the original goal, indicator of success, status, start and due dates.

The Other Details tab displays information that was entered in the goal, such as an action plan and goal progress notes that were entered during the review period.
**Supervisor Comments**
Just like in Universal Competencies you can enter your comments directly into the comment box or finalize your comments offline in a word processing program and copy and paste them into the comment box. The comment box has simple tools for editing fonts, bulleted lists, web links, spell check, and legal scan. But unlike Competencies there is no Writing Assistant for goals and accomplishments.

**Section Comments**
The Section Comments box is primarily used by staff to summarize accomplishments, awards, presentations, or other achievements made during the review period that were not covered by the Universal Competencies or Goal Plan. Supervisor comments are not required, but if entered they should focus on the employee’s comments. This is not where you summarize the employee’s performance for the year that is in the next section.

**Performance Summary**
Once you have entered comments for all of the goals and accomplishments, you need to enter your official rating of your employee’s performance.

Use the pull down menu to select your rating. The goal scale is slightly different from the competencies scale and can be reviewed by clicking on the question icon.
**Section Comments/Supervisor Comments**
Just as with all of the other comment boxes, you can enter your summary of an employee’s performance or final comments directly into the comment box or work offline in a word processing program and then copy and paste them into the comment box. The same tools that are available in goals comment boxes are also available here and include spell check and legal scan.

**Discussion Date**
After you and your staff member have completed the performance review form you need to meet to discuss the review, comments, and goals for the upcoming review period.

The date you enter in the review form for conducting the discussion will be tracked as the performance review completion date.

**Next Year’s Goals**
The last section of the Performance Review is to review the employee’s proposed goals and accomplishments for the coming year. This is a good opportunity for you to review the employee’s goals, and when appropriate, make edits or make notes for your one-on-one Performance Review discussion.

**Save, Return, Cancel, or Finalize/Send for Signature**
At the very bottom of the form you have a few options.

Up until the form is complete you can use the “Return to Employee for Edits” link addition employee comments or revisions.
While you are working on the performance review you can click on the “Save and Close” link at any time and return to the form at a later time.

Using the “Cancel” button closes the form and does not save any of your changes.

The “Finalize/Send for Signature” button forwards the completed form to the employee for their signature indicating that a performance review meeting and discussion has taken place. You cannot send the review to the employee for a signature until after you have met with the employee and discussed the performance review. If all of the required fields are not completed you will receive an error message outlining what is required to complete the form.

If the form is complete when you click on the “Finalize/Send for Signature” button a confirmation dialog box opens, allowing you the opportunity to Finalize and Send, Send and open the Next Form, or Cancel and Return to Form.