

Performance Review Process

General notes

The next annual performance review deadline is **March 31, 2024**.

A rating of *Outstanding* or *Unsatisfactory/Needs Improvement* must be reviewed by **Julie Rothbardt, Senior Director, CLAS HR** prior to the supervisor's performance review discussion with the employee.

Initiate/Launch Review

P&S

The employee launches their online performance review in Self Service (*My Career | Career & Performance | Performance Review*), completes their self-review, and then sends it to their supervisor (*Submit Performance Review*).

Alternatively, the supervisor initiates the review, and then sends the form to the employee to begin working on it (*Send to Employee for Comments*). The supervisor and employee should review the previous year's goals to prepare.

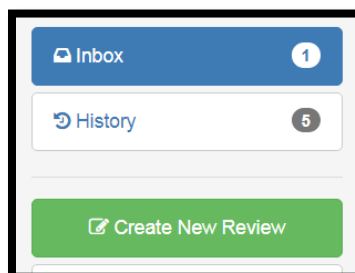
The supervisor should:

- share details about the performance review process when scheduling the review; and
- ask the employee to complete their self-review well in advance of the discussion to allow time to review and prepare.



Merit

The supervisor initiates the form for Merit employees by selecting the *Create New Review* button on the left side of the page in the performance tool. **Merit employees do not have access to the performance review until the acknowledgement step**, so the supervisor should provide a self-assessment form to the employee so they can complete it and share it with the supervisor prior to the discussion.



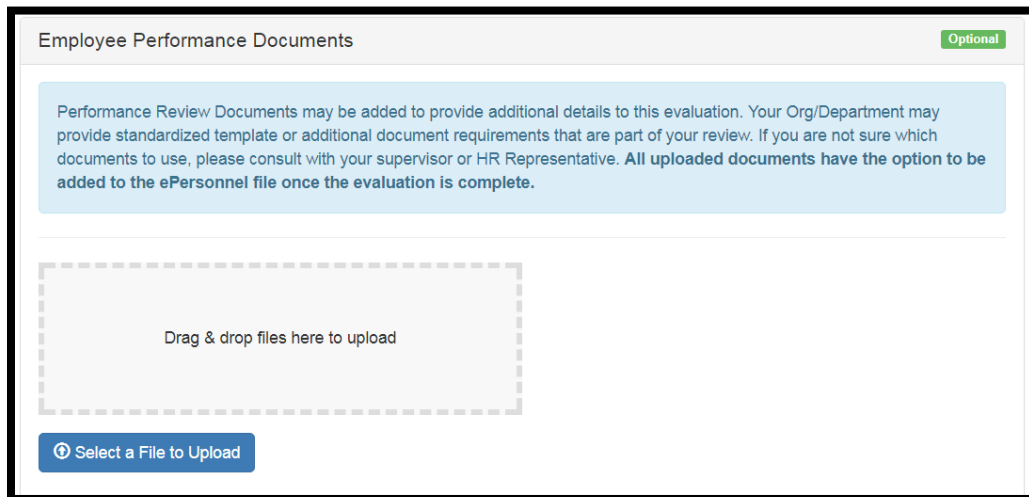
Employee Self-Review

P&S

The employee enters comments in the form, including the *Universal Competencies*, *Employee Goals & Accomplishments* and *Employee Additional Comments* sections. The employee has two options for entering next year's goals. They can:

- 1) enter them directly in the *Employee Additional Comments* section; or
- 2) upload them as an attachment by dragging and dropping into the *Employee Performance Documents* section.

When finished, the employee sends the review form to the supervisor by selecting the *Submit Performance Review* button at the bottom of the online form.



The screenshot shows a web interface titled "Employee Performance Documents" with a green "Optional" tag in the top right corner. Below the title is a light blue informational box containing the text: "Performance Review Documents may be added to provide additional details to this evaluation. Your Org/Department may provide standardized template or additional document requirements that are part of your review. If you are not sure which documents to use, please consult with your supervisor or HR Representative. All uploaded documents have the option to be added to the ePersonnel file once the evaluation is complete." Below this box is a large dashed rectangular area with the text "Drag & drop files here to upload" centered inside. At the bottom left of the form is a blue button with a circular icon and the text "Select a File to Upload".

Merit

Merit employees do not have access to the performance tool until the acknowledgement step, so the supervisor should provide a self-assessment form to the employee so they can complete it and share it with the supervisor prior to the discussion. The supervisor is responsible for uploading the document into the online form.

Request Feedback

P&S and Merit

A performance review best practice is to get feedback from direct reports - and others, as appropriate – for all staff who supervise others. **Feedback can also be useful for non-supervisory staff.** A discussion with the employee about who they would like to ask for feedback is a collaborative and transparent way to decide upon a list of feedback providers. The *Request Feedback* feature in the performance review is for soliciting feedback from others who work with, or are served by, the employee.

To ensure useful feedback, provide guidance on the type of feedback you are interested in receiving, and seek feedback that is based on observable behavior. An example of a helpful feedback prompt is, "Please describe your personal observations of (employee's) strengths and areas for development related to their ability to meet deadlines." This is specific enough to yield helpful and actionable information and encourages the person providing feedback to cite actual examples and behaviors.

Be sure to prepare your employee for this practice; do not let it be a surprise.

The screenshot shows a web form titled "Request Feedback". At the top, there are two radio button options: "Send Request to University of Iowa Individual" (which is selected) and "Send Request to a Non-University Individual". Below this is a "Person Search" section with a text input field containing the placeholder "Search by Name, University ID or Employee ID" and a blue "Search" button. A note below the search field states "Search must be a minimum of 3 characters". Underneath is a "Deadline for Feedback" section with a date picker. The next section is "Additional Text for the Feedback Request", with a sub-instruction: "Use this to request specific information from the individual above." This is followed by a large text area. At the bottom left of the text area, it says "0 of 2000 characters used." At the very bottom of the form are two buttons: "Send Feedback Request" and "Cancel".

Supervisor Comments & Rating

P&S

Following receipt of the employee's self-review, the supervisor enters comments and feedback in the form. The supervisor may also review, respond to, and edit next year's goals in advance of the performance discussion.

Note: **The employee will not see any supervisor comments until the Employee Acknowledgement step, but the supervisor will be able to see any information entered in the review tool by the employee.** The form can be sent back and forth between the employee and supervisor as many times as necessary to facilitate editing and/or changing comments or attachments. A print option is available by selecting the *Print Review* button on the left side of the page in the performance tool. This is useful if the supervisor wants to share a draft with the employee during the conversation.

The screenshot shows a vertical navigation menu for "Performance Review" in the Talent.UIOWA system. At the top, there is a "Return to Inbox" button with a left-pointing arrow. Below that is a blue "Review Summary" button. Underneath are four light blue buttons: "Universal Competencies", "Goals & Accomplishments", "Performance Documents", and "Review Comments". At the bottom of the menu is a "Print Review" button with a printer icon.



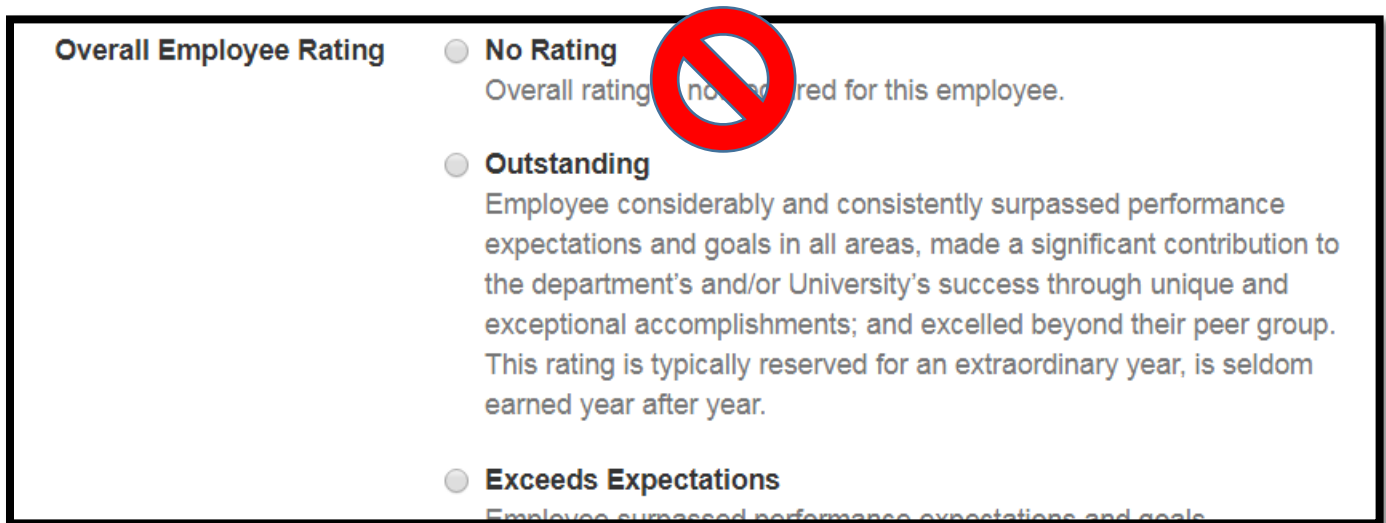
STOP: The supervisor and the employee meet to discuss and review before sending the form on to the Employee Acknowledgment (final) step. If the supervisor is planning to give a rating of 'Outstanding' or 'Unsatisfactory/Needs Improvement,' they need to discuss this with their supervisor, who will share that information with Julie Rothbardt, Senior Director, CLAS HR, as appropriate. This must take place prior to meeting with the employee.

After the performance review discussion between the employee and supervisor, the supervisor can make additional edits and then finalize the review. Selecting *Finalize Review & Send for Acknowledgment* at the bottom of the performance review will complete the review and send it to the employee for their signature.



Merit

The supervisor enters comments related to *Universal Competencies, Employee Goals & Accomplishments* and *Supervisor Comments*, and can attach the employee's self-review, and any other additional documentation. **Do not use the No Rating option.** A print option is available for sharing a draft with the employee during the conversation.



STOP: The supervisor and the employee meet to discuss and review before sending the form on to the Employee Acknowledgment step.

After the performance review discussion between the employee and supervisor, the supervisor can make additional edits and then finalize the review. Selecting *Finalize Review & Send for Acknowledgment* at the bottom of the performance review will complete the review and send it to the employee for their signature.

Employee Acknowledgement

P&S and Merit

The employee reviews the information sent to them by their supervisor and can provide final comments (optional). The employee then signs the review. A copy of the performance review will be automatically uploaded to the employee's ePersonnel file, and the performance review process is complete.