



# Managers Using the Online Performance Review System

Steps for writing Performance Reviews in the online system



Navigate to Employee Self Service and click on Performance Planning & Review.

Performance Planning / Review

**Tufts UNIVERSITY** Performance Development Program

### Welcome to Performance Planning and Review

Welcome to Performance Planning and Review online. The @Work Performance Development Cycle has four major phases, as well as ongoing coaching and feedback provided by the manager. This online tool is used to document two of these major phases, Performance Planning and Performance Review.

- Performance Planning typically starts in July, at the beginning of the fiscal year.
- During Checkpoint review time in December and January, managers and employees review the plan, discuss accomplishments to date, and challenges, or changes in key performance area priorities.
- Annual Performance Reviews are written by managers, and delivered to employees in May. Managers will be notified when the online Performance Review becomes available to begin drafting reviews.
  - Note, Employees are strongly encouraged to submit their own Performance Summary to their manager, and can easily access their Performance Plan to assist in writing their summary.

Click on the appropriate button below to navigate to either the online Performance Plan or online Performance Review.

Fiscal Year 2016	Fiscal Year 2015
Performance Planning	Performance Planning
<a href="#">Continue to Performance Plan</a>	<a href="#">Continue to Performance Plan - View Only</a>
Performance Review	Performance Review
<a href="#">Continue to Performance Review</a>	<a href="#">Continue to Performance Review</a>

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### Performance Review for Fiscal Year: 2016

Performance Period from: 07/01/2015 to 06/30/2016

Direct reports		
Empl ID	Name	Job Title
1001001	Christopher A. ...	Director of ...
1001002	Jessica ...	Manager of ...
1001003	David ...	Assistant ...
1001004	Robert ...	Senior ...

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Performance Review for Fiscal Year: 2016  
Performance Period from: 07/01/2015 to 06/30/2016

Selected Employee  
Name: [Redacted]

Direct reports

Emol ID	Name	Job Title
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]

Employee Performance Review View and Print Performance Review

1. Select the employee by clicking on their name.

2. Click on Employee Performance Review button.

Performance Areas and Results

Employee: [Redacted]

Performance Planning  
# 1 Created: 12/23/15 11:48AM Last Update: 12/28/15 11:36AM

Key Performance Area Performance Period: 07/01/2015 to 06/30/2016

Organizational Knowledge Expertise Interaction with Others Continuous Improvement  
Customer Focus Resourcefulness and Results Leadership

Comments  
Indicate what was accomplished and how it was accomplished (required prior to printing and forwarding to employee)

Write performance feedback for goal here.

Indicate steps for employee to take for continuous improvement or to sustain performance

Write feedback for continuous improvement here.

Save Cancel  
Return to Performance Review page Previous KPA Next KPA Proceed to comments and rating

Employee's Key Performance Areas (goals) populate from their Performance Plan.

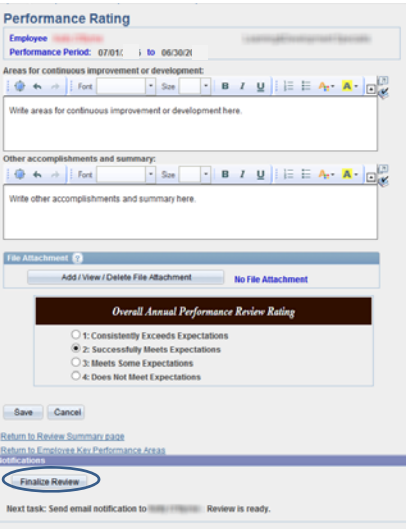
Write performance feedback for the goals here.

Always click Save before leaving the page.

Click Next KPA to navigate to the next goal.

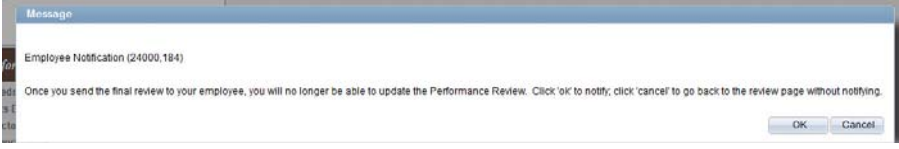
The screenshot shows the 'Performance Areas and Results' form. At the top, it displays 'Employee: Kelly O'Byrne' and 'Performance Planning' details. Below this is a 'Key Performance Area' section with a 'Performance Period' of 07/01/2 to 06/30/20. A blue arrow points from this section to a 'Comments' section. The 'Comments' section has two text boxes: 'Indicate what was accomplished and how it was accomplished (required prior to printing and forwarding to employee)' and 'Indicate steps for employee to take for continuous improvement or to sustain performance'. A blue callout box on the right contains the text: 'Write feedback for the remaining goals and when ready click on Proceed to comments and rating button'. At the bottom of the form, the 'Proceed to comments and rating' button is circled in blue.

The screenshot shows the 'Performance Rating' form. It includes the same employee and performance period information as the previous screen. There are two text boxes for 'Areas for continuous improvement or development' and 'Other accomplishments and summary'. A blue callout box on the left says 'Write areas for continuous improvement and other accomplishments in these text boxes.' Another blue callout box on the right says 'If preferred, you can attach a performance review document written outside of the system here.' Below these is a 'File Attachment' section with a circled 'Add / View / Delete File Attachment' button. At the bottom, there is a section for 'Overall Annual Performance Review Rating' with four radio button options: '1: Consistently Exceeds Expectations', '2: Successfully Meets Expectations', '3: Meets Some Expectations', and '4: Does Not Meet Expectations'. A blue callout box on the left says 'Select the Overall Performance Rating for the employee.' At the bottom, the 'Save' button is circled in blue, with a callout box saying 'Click Save.'



The screenshot shows a web-based 'Performance Rating' form. At the top, it displays 'Employee: [redacted]' and 'Performance Period: 07/01/11 to 06/30/12'. Below this are two text areas: 'Areas for continuous improvement or development' and 'Other accomplishments and summary', each with a rich text editor toolbar. A 'File Attachment' section shows 'No File Attachment'. The 'Overall Annual Performance Review Rating' section has four radio button options: '1: Consistently Exceeds Expectations', '2: Successfully Meets Expectations' (which is selected), '3: Meets Some Expectations', and '4: Does Not Meet Expectations'. At the bottom, there are 'Save' and 'Cancel' buttons, and a 'Finalize Review' button which is circled in blue. A 'Next task' note at the very bottom says 'Send email notification to [redacted] Review is ready.'

After writing the Performance Review and having the Performance Review meeting with the employee, click Finalize Review



The screenshot shows a 'Message' dialog box titled 'Employee Notification (24000,184)'. The message text reads: 'Once you send the final review to your employee, you will no longer be able to update the Performance Review. Click 'ok' to notify; click 'cancel' to go back to the review page without notifying.' There are 'OK' and 'Cancel' buttons at the bottom right of the dialog.

**\*\*Important: Once the Review is finalized, you can no longer edit the content.**

