

# Managers Using the Online Performance Review System: Steps for Writing Performance Reviews in the Online System

From AccessTufts, navigate to Employee Self-Service (eServe) and click on the Performance Planning and Review tile.

The screenshot shows the AccessTufts website interface. At the top, there is a navigation bar with 'AccessTufts', 'My Tufts', 'Get Started with...', and 'Services'. Below this is a search bar. A 'Bulletin Board' section features a pin icon and a link to 'Training for Working and Teaching Remotely'. The 'Quick Access' section is highlighted with a red box and contains three items: 'Go to eServe', 'Go to Web Email (faculty & staff)', and 'Request A/V'. A 'My Favorites' section with a star icon and a 'Log In' button is also visible. The main content area is titled 'Employee Self Service' and contains a grid of tiles. The 'Performance Planning & Review' tile is highlighted with a red box and contains a bar chart icon and the text: 'Create, edit, and view performance plans, and complete checkpoint and performance reviews'. Other tiles include 'Benefit Information', 'Add Additional Names', and 'Education & Credentials'.

Click on the Continue to Performance Review button for the current year.


Fiscal Year: 20

**Performance Planning**

**Continue to Performance Plan**

**Performance Review**

**Continue to Performance Review**



View list of direct reports.

Performance Plan for Fiscal Year: 20

Performance Period from: 07/01/20 to 06/30/20

**Direct reports**

Empl ID	Name	Job Title
	( ) t	Learning & Development Spec
1		Sr Learning & Dev Specialist
1		Benefits Program Manager
1		Sr Learning & Dev Specialist

Select the employee by clicking on their name. And then click the Employee Performance Review button.

Performance Plan for Fiscal Year: 20

Performance Period from: 07/01/20 to 06/30/20

Selected Employee

Empl ID:

[Return to All Direct/Indirect](#)

Benefits Program Manager  
Supervisor:

Human Resources  
Director Learning & Developmt

Direct reports

	Empl ID	Name	Job Title
	<input type="text"/>	<input type="text"/>	Learning & Development Spec
	<input type="text"/>	<input type="text"/>	Sr Learning & Dev Specialist
✓	<input type="text"/>	<input type="text"/>	Benefits Program Manager
	<input type="text"/>	<input type="text"/>	Sr Learning & Dev Specialist

[Employee Performance Review](#) [View and Print Performance Review](#)

You will be brought to the first Key Performance Area (Goal) that populates from the current year performance plan.

Write performance feedback in the text boxes at the bottom of the page and click save.

Click Next KPA to navigate to the next goal.

Performance Planning

# 1 Created [redacted] 09/06/2019 8:38AM Last Update [redacted] 09/06/2019 8:43AM

Key Performance Area Performance Period: 07/01/2019 to 06/30/2020

[Redacted text box]

Organizational Competencies

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



Results

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

Write performance feedback here.

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

Write feedback for continuous improvement here. |

Save Cancel

<< Previous KPA Next KPA >>

Return to Performance Review page

Proceed to comments and rating

After writing feedback for the remaining goals, click on the Proceed to comments and rating button.

Performance Planning

# 1 Created [redacted] 09/06/ 8:38AM Last Update [redacted] 09/06/ 8:43AM

Key Performance Area Performance Period: 07/01/2019 to 06/30/2020

[Redacted text area]

Organizational Competencies

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



Results

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

[Rich text editor toolbar: Font, Size, Bold, Italic, Underline, Bulleted List, Numbered List, Text Color, Background Color]

Write performance feedback here.

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

[Rich text editor toolbar: Font, Size, Bold, Italic, Underline, Bulleted List, Numbered List, Text Color, Background Color]

Write feedback for continuous improvement here. |

Save Cancel

<< Previous KPA Next KPA >>

**Proceed to comments and rating**

[Return to Performance Review page](#)

Write areas for continuous improvement and other accomplishments in the top text boxes.

If preferred, you can upload a performance review document by clicking on the Add/View/Delete File Attachment button.

Select the Overall Performance Rating for the employee, and then click Save.

The screenshot displays the performance review interface. At the top, it shows the employee's name (redacted) and the role 'Benefits Program Manager'. The performance period is set from 07/01/20 to 06/30/20. There are two text entry areas: 'Areas for continuous improvement or development:' and 'Other accomplishments and summary:'. Each area has a rich text editor toolbar with options for font, size, bold, italic, underline, bulleted list, numbered list, and text color. Green arrows point to the text boxes. Below these is the 'File Attachment' section, which contains a button labeled 'Add / View / Delete File Attachment' (highlighted with a green box) and a status indicator 'No File Attachment'. The 'Overall Annual Performance Review Rating' section features a dark header and four radio button options: '1: Consistently Exceeds Expectations', '2: Successfully Meets Expectations', '3: Meets Some Expectations', and '4: Does Not Meet Expectations'. A green arrow points to this section. At the bottom, there are 'Save' and 'Cancel' buttons, with the 'Save' button highlighted by a green box. Below the buttons are two links: 'Return to Review Summary page' and 'Return to Employee Key Performance Areas'.

After writing the performance review and having the performance review meeting with the employee, click the Finalize Review button. This will give the employee access to the review online so they can view and complete their electronic signature.

*Remember, once the performance review is finalized, you can no longer edit the content.*

Performance Period: \_\_\_\_\_

**Areas for continuous improvement or development:**

Write continuous improvement or development feedback here.

**Other accomplishments and summary:**

Write other accomplishments and summary here.

**File Attachment**

Add / View / Delete File Attachment    No File Attachment

**Overall Annual Performance Review Rating**

- 1: Consistently Exceeds Expectations
- 2: Successfully Meets Expectations
- 3: Meets Some Expectations
- 4: Does Not Meet Expectations

Save    Cancel

[Return to Review Summary page](#)  
[Return to Employee Key Performance Areas](#)

Notifications

**Finalize Review**

Next task: Send email notification to \_\_\_\_\_ - Review is ready.