# Intro to Performance Module

A Guide to Navigating the Performance Module

# What We'll Cover Today

- Performance Management Cycle

- Performance Management Timeline

- How to Access

- Performance Module Home Page

- Detailed Walk Through Each Step

- Other
  - Printing Completed Reviews
  - Cascading Goals as a Supervisor

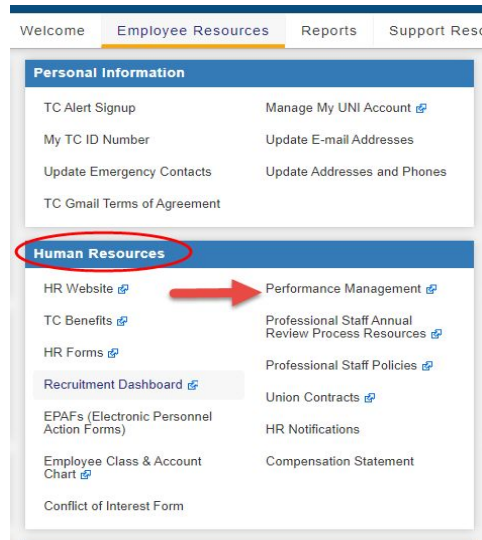# Performance Management Cycle



Goal Setting and Planning

Feedback and Check-Ins

Mid Year Review

Feedback and Check-Ins

End Year Review

# Performance Management Timeline

| # | Description | Stage |
|---|---|---|
| 1 | Employee Suggested Goals | Planning |
| 2 | Supervisor Finalization of Goals | Planning |
| 3 | Mid-Year Check In | Check-In |
| 4 | End of Year Final Review - Employee | Self-Review |
| 5 | End of Year Final Review - Supervisor | Manager Review |
| 6 | Employee Confirmation | |

# How to Access
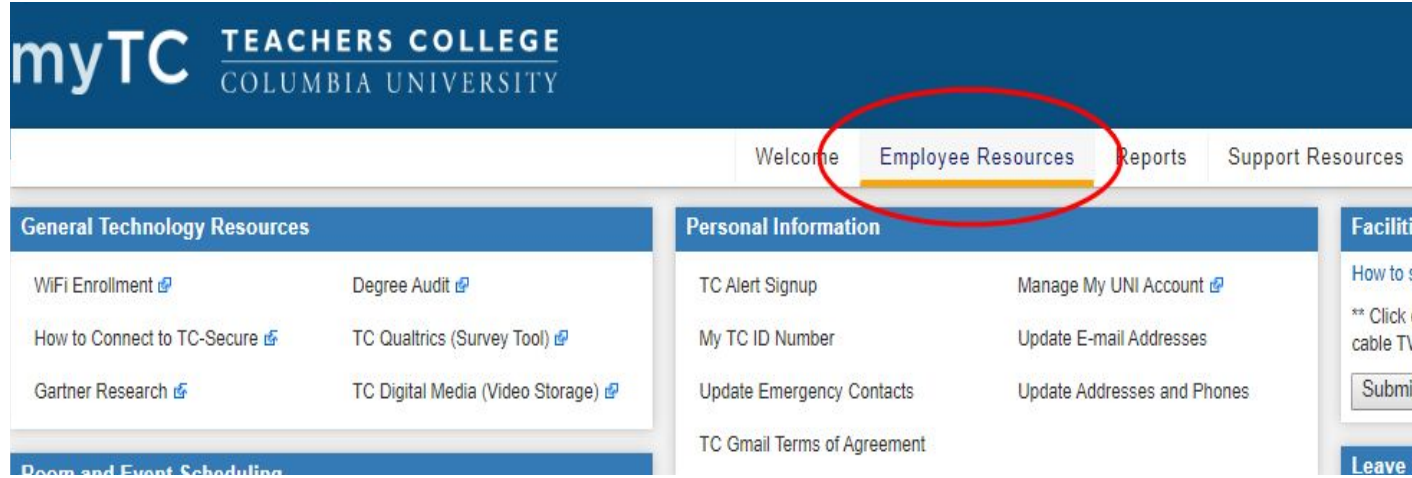


Log into myTC and select **Employee Resources**.



Navigate to the **Human Resources section** and click the **Performance Management** link

# Performance Module Home Page
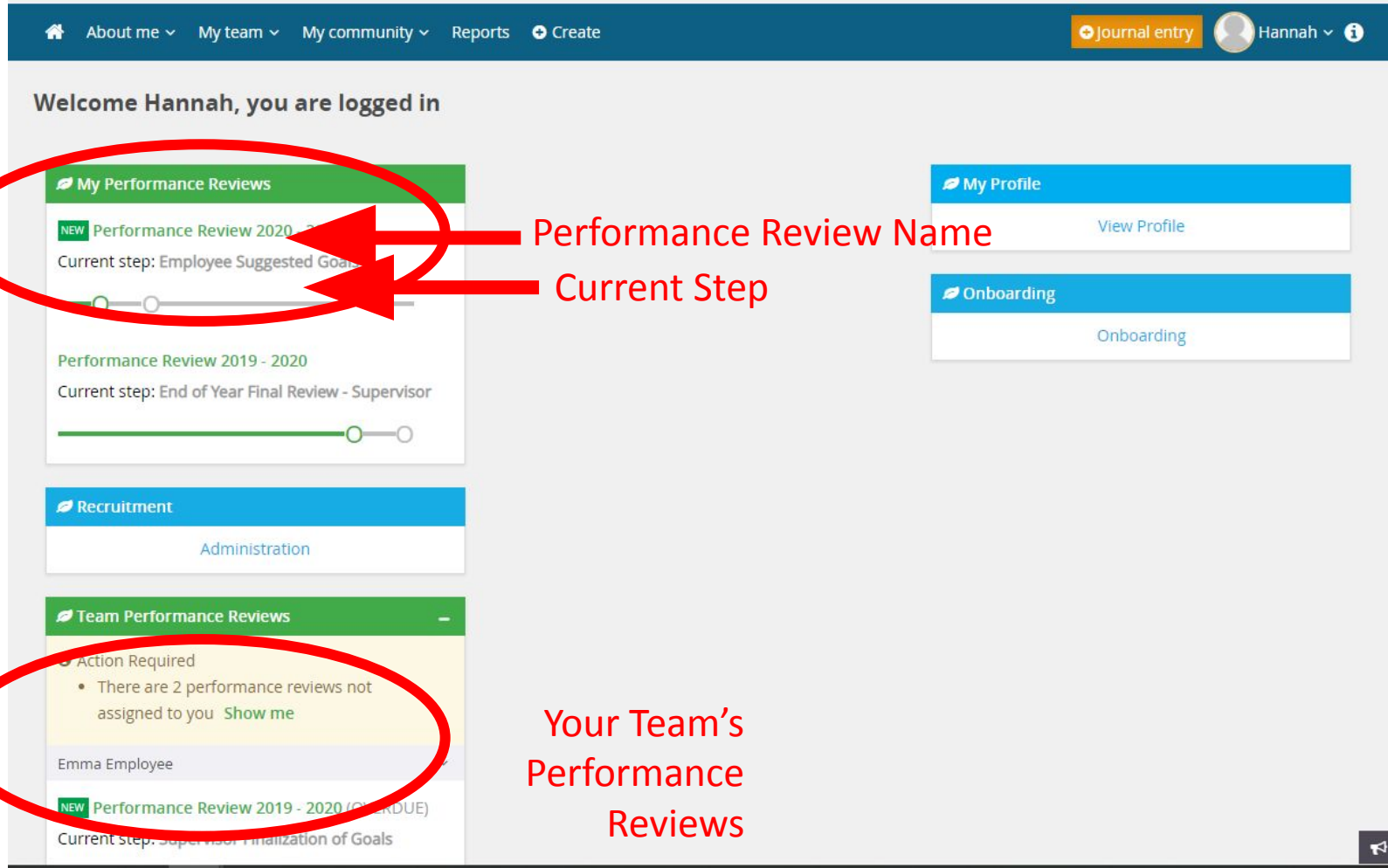


Your Performance Reviews

Performance Review Name

Current Step

Your Team's Performance Reviews

# Home Screen – Employee View

# Home Screen – Supervisor View

# Home Screen – Supervisor View

# Umbrella View for all Direct Reports

# Viewing Archived Performance Reviews - Employee
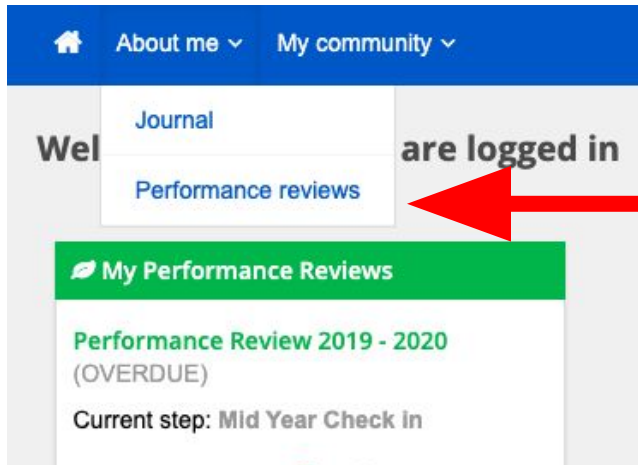
In the About me tab, click the Performance review link

You will see all of your performance reviews
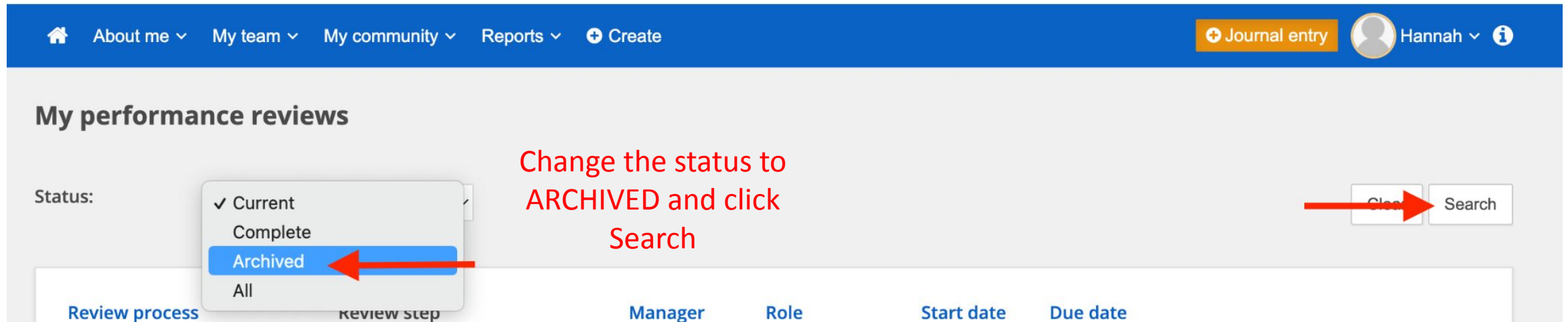
Change the status to ARCHIVED and click Search

# Viewing Archived Performance Reviews - Manager
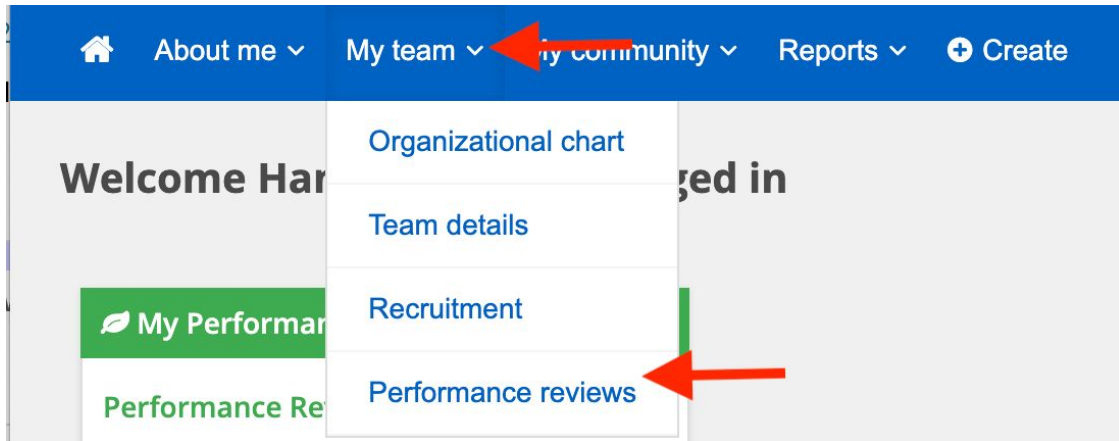


In the **My team** tab, click the **Performance reviews** link

Change the status to **ARCHIVED** and click **Search**

# Step 1: Employee Suggested Goals

| # | Description | Stage |
|---|---|---|
| 1 | Employee Suggested Goals | Planning |
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# Employee Performance Review Home Screen

# Employee Performance Review Home Screen

# Employee Performance Review Home Screen

# Job Responsibilities



This pulls from the Job Duties listed on the Job Description

Click when you're ready to move to the next section

# Goals & Objectives



Hannah Masbad - Performance Review 2020 - 2021

Start | Job Responsibilities NEW | **Goals & Objectives** | Areas of Strength (Optional) | Development Plan | Next steps

Goals & Objectives

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**Employee:**

At the Employee Suggested Review stage, suggest goals for the upcoming year. Then, for the remainder of the year, regularly review and comment on your progress

Describe the progress made during this year toward the three to five goals and objectives identified for review during this period.

Please note, your Supervisor can cascade their goals within your performance review. These will appear at the top.

--------------------------------------------------------------------------------------------------------------------

**Supervisor:**

You can comment against each Goal and Objective. Throughout the year you can comment on their progress and add relevant Journal items throughout the year.

# Inputting Goals

Item title

Title*     Test Goal #1

Description    **B** *I* U   ≔   ∷   ≡ ≡ ≡ ≡   ⊞   🔗   ⤢   ‹› Source

write a description of the goal here.

Status     Current

Target date    23 Oct 2021   📅

Attachment    ☁ Upload document

Status    Current ⌄

get date

Current
Completed
No longer achievable
Cancelled

Item title

**Title*** Add Goal & Objective 3...

Description

B *I* U | list-ordered list-unordered | align-left align-center align-right justify | table link | fullscreen | Source

**Status** Current

**Target date** 23 Oct 2021

**Attachment** ☁ Upload document

**Delete Goal** →

⊕ Add Goal ←

← Back →

**Move to Next Section** → Next →

# Areas of Strength (Optional)

Hannah Masbad - Performance Review 2020 - 2021

Start \ Job Responsibilities NEW \ Goals & Objectives \ **Areas of Strength (Optional)** \ Development Plan \ Next steps

Areas of Strength (Optional)

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**Employee:**

Identify any skill or knowledge area which you would like to note as a strength and/or something that can be further leveraged over the course of the next year. Please be as specific as possible. Each strength should be it's own entry and you should identify as many as possible.

Please note: this section is non-mandatory and does contribute to your overall performance outcome.

---------------------------------------------------------------------------------------------------------------------------------

**Supervisor:**

Add any relevant strengths to your employees review. You can comment on their progress throughout the review.

Item title

Title* | List your areas of strength

Description | B  I  U  | ⅔☰  ☰ | ☰  ☰  ☰  ☰ | ⊞ ⊜ | ⤢ | ⟨⟩ Source

# Development Plan



Start  Job Responsibilities NEW  Goals & Objectives  Areas of Strength (Optional)  **Development Plan**  Next steps

Development Plan                                    ✔ Saved  Last saved: 4 Nov 2020, 1:53pm  Actions ▾

**Employee**

Propose at least one development goal for the next appraisal period, where job-related skills can be enhanced.

Access lynda.com to view a wide range of applicable online tutorials and courses.

-------------------------------------------------------------------------------------------------------------

**Supervisor**

Please review your employees identified areas of development.

-------------------------------------------------------------------------------------------------------------

The **Development Plan** ensures that you receive the appropriate development and support to meet your goals for both your current role and future career development path.

Your Development Plan should be simple and achievable. To assist in determining your development needs, give consideration to the following priorities:

- Which skills, knowledge and experience do you most need to develop in your current role to improve your performance?
- Which skills, knowledge and experience do you need to develop to ensure you achieve the coming year's goals?
- Note: Don't forget to provide a description of the activity and the date to be completed.

# Development Plan

Item title

Title* Development Plan

Description

B *I* U | 1≡ ::≡ | ≡ ≡ ≡ ≡ | ⊞ ⌖ | ⤢ ⟨⟩ Source

⊕ Add Development activity

← Back →     Move to Next Section     Next →

# Next steps

# Next steps (continued)

The next step of the Performance Review

Your next step: Supervisor Finalization of Goals

ⓘ Clicking "Go to next step" will move this review to the next step and you will be unable to return to this step

Performance Review 2019 - 2020

Employee Suggested Goals

Supervisor Finalization of Goals

Go to next step

Journal

Mid Year Check in

View entire process

Journal
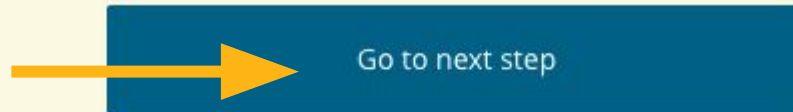
End of Year Final Review - Employee

# Step 2: Supervisor Finalization of Goals

| # | Description | Stage |
|---|---|---|
| 1 | Employee Suggested Goals | Planning |
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# Step 2: Supervisor Finalization of Goals

Emma Employee - Performance Review 2019 - 2020

Start | Job Responsibilities NEW | Goals & Objectives | Areas of Strength (Optional) | Development Plan | Next steps

Last saved: 20 Nov 2020, 12:11am    Actions ▼

**Click through each tab to review what your employee input in each of the different sections**

PLANNING | PROGRESS | CHECK-IN | PROGRESS | SELF REVIEW | MANAGER REVIEW | COMPLETE

Hi Johanna,

During this step you will meet with your employee to set and agree their goals for the year. This can be accomplished in at least two ways. You can use this for to to provide suggestions to your supervisor prior to a meeting OR you and your supervisor can meet to discuss annual goals and complete the form together. Confirm with your employee on the preferred course to initiate this review cycle. Please click the 📄 Performance Review Manual for further instructions.

Next ➜

# Step 2: Supervisor Finalization of Goals



As a supervisor, you will be able to review all the goals and development plan items that the employee suggests for themselves. You can make updates as needed.

# Next steps (continued)

# Step 3: Mid – Year Check In

| # | Description | Stage |
|---|---|---|
| 1 | Employee Suggested Goals | Planning |
| 2 | Supervisor Finalization of Goals | Planning |
| 3 | Mid-Year Check In | Check-In |
| 4 | End of Year Final Review - Employee | Self-Review |
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# Mid Year Check In

# Mid Year Check In



- Review Each Section
- Add Comments as needed
  - Save & Share → will be viewable by all
  - Save as Private → only viewable by you
- Cannot delete goals at this time
  - Recommend to write a comment if no longer applicable
- Can add new goals/items

# Step 4: End of Year Final Review - Employee

| # | Description | Stage |
|---|---|---|
| 1 | Employee Suggested Goals | Planning |
| 2 | Supervisor Finalization of Goals | Planning |
| 3 | Mid-Year Check In | Check-In |
| 4 | End of Year Final Review - Employee | Self-Review |
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| 6 | Employee Confirmation | |

# Step 4: End of Year Final Review - Employee

Emma Employee - Performance Review 2019 - 2020

Start | Job Responsibilities NEW | Goals & Objectives | Areas of Strength (Optional) | Development Plan | Next steps

Last saved: 20 Nov 2020, 2:21am | Actions ▼

PLANNING | PROGRESS | CHECK-IN | PROGRESS | SELF REVIEW | MANAGER REVIEW | COMPLETE

Hi Emma,

During this step you will review and add your final comments. Once you click 'Next', your Supervisor will rate your Annual performance.
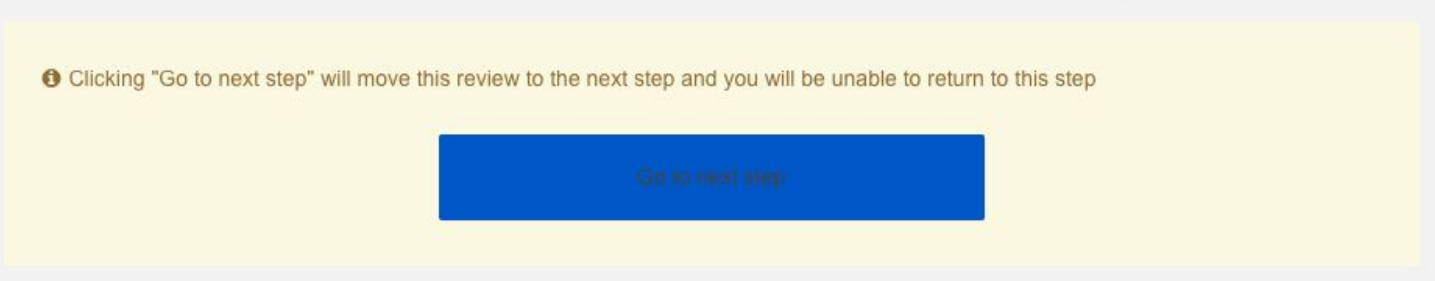
Upon your acknowledgment, your performance assessment will be complete.

Employee should review each section. You can add your comments against each item in each section.

# Step 4: End of Year Final Review - Employee

Emma Employee - Performance Review 2019 - 2020

Start | Job Responsibilities NEW | **Goals & Objectives** | Areas of Strength (Optional) | Development Plan | Next steps

⌄ Add Goal & Objective 1... [Current]

**Hannah Masbad**

Not rated

📅 **Target date:** 30 Aug 2024

- Cannot Rate (Supervisor Only)
- Can add comments

[Add comment ⌄]

There are no comments for this item.

# Step 4: End of  Final Review - EmployeeYear

# Step 5: End of Year Final Review - Supervisor

| # | Description | Stage |
|---|---|---|
| 1 | Employee Suggested Goals | Planning |
| 2 | Supervisor Finalization of Goals | Planning |
| 3 | Mid-Year Check In | Check-In |
| 4 | End of Year Final Review - Employee | Self-Review |
| 5 | End of Year Final Review - Supervisor | Manager Review |
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# End of Year Final Review - Supervisor

Emma Employee - Performance Review 2019 - 2020

ⓘ This review has been opened by the employee in another window. Editing has been disabled to prevent conflicts.

Start    Job Responsibilities NEW    Goals & Objectives    Areas of Strength (Optional)    Development Plan    Next steps

Last saved: 20 Nov 2020, 2:43am    Actions ▼

PLANNING    PROGRESS    CHECK-IN    PROGRESS    SELF REVIEW    MANAGER REVIEW    COMPLETE

Hi Johanna,

During this step you will rate your employee's performance. Please note that once you click 'Next', Emma's performance review will be submitted and complete.

Prior to submitting their review you may with to assess all other team members and input your final rating.

Upon your completion of the assessment, you can share your assessment with Emma.

Supervisor should review each section. You can add the final comments that your employee input and also add your own comments against each item in each section.

# End of Year Final Review - Supervisor

# Emma Employee - Performance Review 2019 - 2020

Start | Job Responsibilities NEW | **Goals & Objectives** | Areas of Strength (Optional) | Development Plan | Next steps

∨ Add Goal & Objective 1... [Current] ✏

| **Description** |
|---|
| **Did not meet goal(s):** Did not meet performance requirements nor completed the objective. Did not perform the job satisfactorily; did not produce the quantity, quality and timelines of work expected; unsatisfactory progress in attaining the goal. |
| **Met goal(s):** Did a good job; handled most assignments within the scope of responsibility. Did not require significant improvement; completed the goal or objective as established. |
| **Exceeded goal(s):** Exceeded position requirements even on the most difficult and complex aspects of the job. Took additional assignments without negatively affecting other work; goal completed thoroughly, completely, and on or ahead of schedule. |

Hannah Masbad

Meets goal

You will see what the rating the employee has given themself for each goal.

You will add your own rating for them against each goal.

You can also add comments as needed.

# End of Year Final Review - Supervisor



Emma Employee - Performance Review 2019 - 2020

ℹ This review has been opened by the employee in another window. Editing has been disabled to prevent conflicts.

Start | Job Responsibilities NEW | Goals & Objectives | Areas of Strength (Optional) | Development Plan | Next steps

Continue to review each section and add comments as needed

Last saved: 20 Nov 2020, 2:43am    Actions ▾

PLANNING — PROGRESS — CHECK-IN — PROGRESS — SELF REVIEW — MANAGER REVIEW — COMPLETE

Hi Johanna,

During this step you will rate your employee's performance. Please note that once you click 'Next', Emma's performance review will be submitted and complete.

Prior to submitting their review you may with to assess all other team members and input your final rating.

Upon your completion of the assessment, you can share your assessment with Emma.

Next →

# Emma Employee - Performance Review 2022 - 2023

Start   〉 Goals & Objectives 〉 Areas of Strength (Optional) 〉 Development Plan 〉 **Next steps**

This averages out all the ratings in the Goals & Objectives section.

✔ Saved   Last saved: 30 Sep 2022, 4:07pm   Actions ▾

Before clicking 'Go To Next Step' please ensure you have assessed other team member scores. Clicking Next will submit the overall review score.

Supervisor Overall Rating

5 / 5

Exceeded goal(s): Exceeded position requirements even on the most difficult and complex aspects of the job. Took additional assignments without negatively affecting other work; goal completed thoroughly, completely, and on or ahead of schedule.

Your overall rating is based on the ~~...~~s your Supervisor gave you.

Goals progress

3 / 5

Overall review

5 / 5

✔ Save

You will be able to rate the employee one last time.

Goals goes from left to right (1-5)

| Value | Description |
|---|---|
| 1<br>Did not Achieve Results | **Did not meet goal(s)** - Does not meet performance requirements or did not complete the objective; Does not perform the job satisfactorily; Does not produce the quantity, quality, and timelines of work expected; Unsatisfactory progress in attaining the goal or objective |
| 2<br>Achieved some but not all Results | **Met some but not all goals**: Sometimes meets expectations, or Partially completed the objective - *Inconsistent Performance.* Does not perform the job satisfactorily; Does not produce the quantity, quality, and timelines of work expected; Unsatisfactory progress in attaining the goal or objective |
| 3<br>Achieved Results | **Met goal(s)** - Is doing a good job; Handles most assignments within the scope of his/her responsibility; Does not require significant improvement; Completed the goal or objective as established |
| 4<br>Successful Results | **Exceeded some goals**: Is doing an excellent job and usually exceeds most requirements; Demonstrates a willingness to perform beyond expectations; Goal or objective completed in a manner that was beyond what was expected |
| 5<br>Exceptional Results | **Exceeded goal(s)** - Exceeds position requirements even on the most difficult and complex aspects of his/her job; Takes on additional assigments without negatively affecting other work; Goal or objective completed thoroughly, completely, and on or ahead of schedule |

# End of Year Final Review - Supervisor

Final comments

**Emma Employee**
No comments made

**Hannah Masbad**

[text editor toolbar: B I U, numbered list, bullet list, align left, align center, align right, justify, table, link, maximize, Source]

Your next step: Employee Confirmation

ℹ Clicking "Go to next step" will move this review to the next step and you will be unable to return to this step

Go to next step

You will be able to read the employee's final comments.

You will be able to write your own final comments for the employee.

You will move the review to the final stage: Employee Confirmation.

# Step 6: Employee Confirmation

| # | Description | Stage |
|---|---|---|
| 1 | Employee Suggested Goals | Planning |
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# Employee Confirmation

**Emma Employee - Performance Review 2019 - 2020**

Start | Job Responsibilities NEW | Goals & Objectives | Areas of Strength (Optional) | Development Plan | Next steps

Last saved: 20 Nov 2020, 3:05am | Actions ▾

PLANNING | PROGRESS | CHECK-IN | PROGRESS | SELF REVIEW | MANAGER REVIEW | COMPLETE

Hi Emma,

This is the final step of your performance review. Please review the final comments and ratings of your hiring manager. During this step you will meet with your supervisor to set and agree your goals for the year. Please see the Stage 9: Employee Confirmation section of the Performance Review Manual for further details on how to print.

You can review the final comments of your supervisor.

On the Next steps tab, be sure to click Go to next step to complete the review process for the year

**Your next step: Complete**

ⓘ Clicking "Go to next step" will move this review to the next step and you will be unable to return to this step

Go to next step

View entire process

# Viewing Completed Performance Reviews
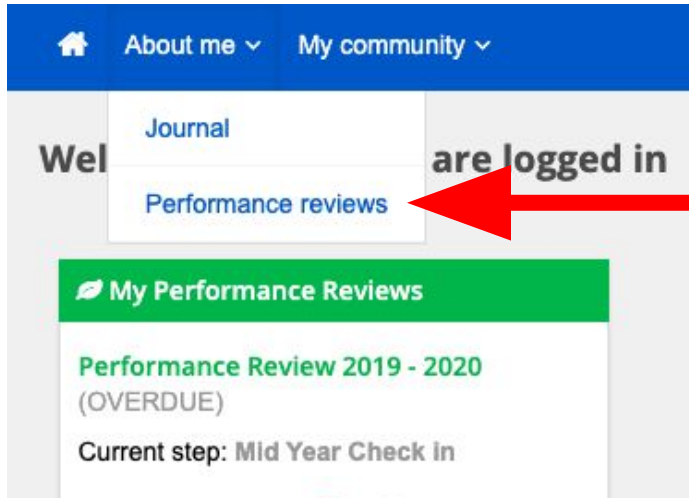
In the About me tab, click the Performance review link

You will see all of your performance reviews
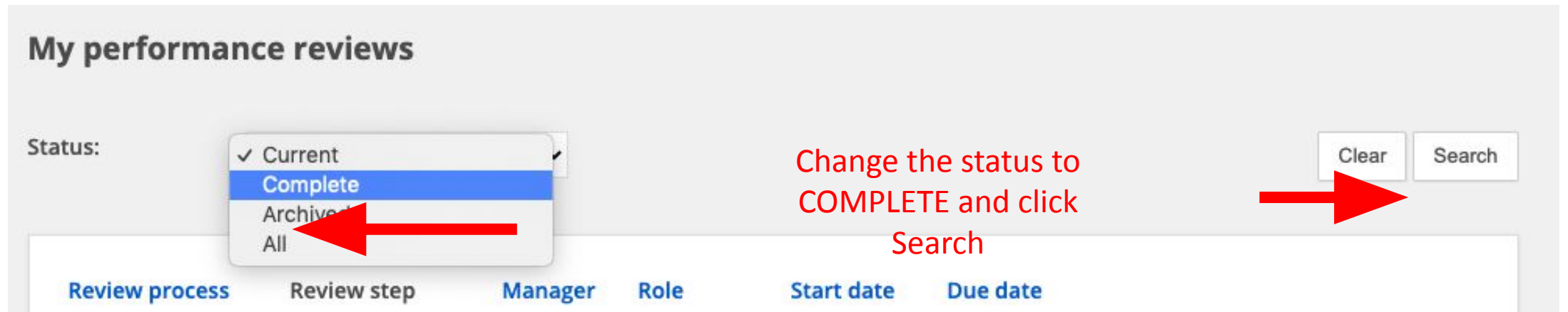
Change the status to COMPLETE and click Search

# Printing Completed Performance Reviews

# Sample: PDF Version of Completed Review

20 November 2020

## Emma Employee - Performance Review 2019 - 2020

**Role:** Professional staff          **Manager:** Hannah Masbad

**Step:** Complete

Your overall rating is based on the ratings your Supervisor gave you.

# 3.9 / 5.0

Is doing an excellent job and usually exceeds most requirements; Demonstrates a willingness to perform beyond expectations; Goal or objective completed in a manner that was beyond what was expected
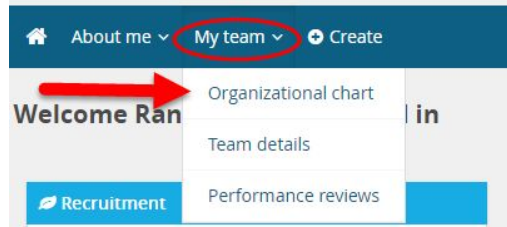
| | Your score | Maximum |
|---|---|---|
| **Job Responsibilities** | - | - |
| Auditing - Assist HRIS Coordinator in analyzing and... | - | - |

# Cascading Goals as a Supervisor

## Step 1

Go to the **Performance Module** home page

Hover over the '*My team*' on the top left and click '*Organizational Chart*'



## Step 2

Click your own name on the organizational chart
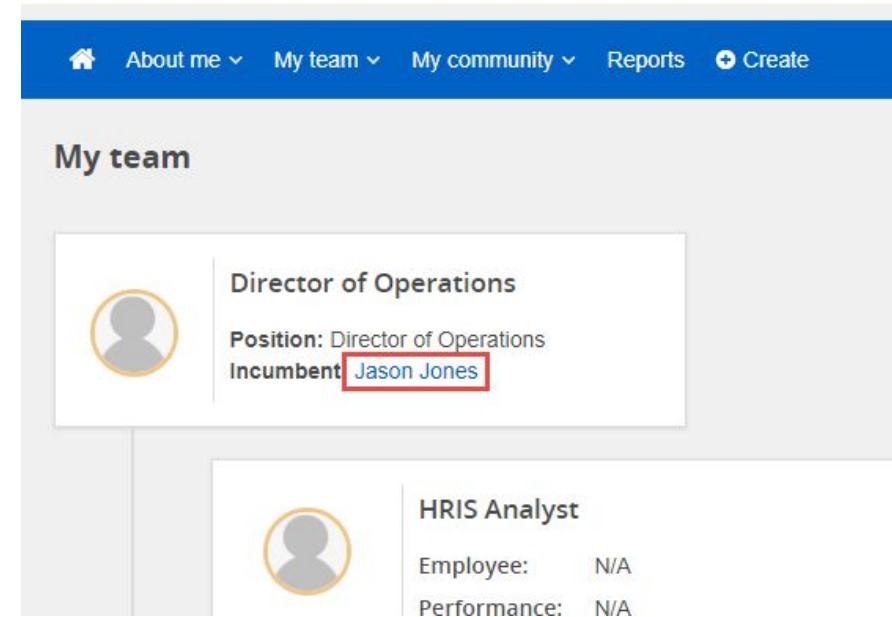
# Cascading Goals as a Supervisor

## Step 3

Click the **Performance** header.

Locate your current review. Under **Status** find **Current**.
From the *'I want'* drop down menu, choose **Cascade Objectives**



## Step 4

You will be presented with a listing of your goals and your team members

# Cascading Goals as a Supervisor

## Step 5

Choose the radio button(s) for the applicable goal(s) and team member, and click **Next**



## Step 6

On the next page, confirm the goal/team member combination and click **Next**

# Cascading Goals as a Supervisor

## Step 7

Your goals have now been cascaded to the appropriate team member

Click **Close**

# Questions?

Contact HRISTeam@tc.columbia.edu