Steps of the Performance Appraisal – P&S

The Performance Review system can be found in Self Service in the My Career section - click on Performance Review.

“Review Cycle” (UHR due date of review form) – calendar year (you’ll see 12/31/XX on form)
Review Period (past period to review) – fiscal or academic year (July - June or August - July)

Step One:

The Employee OR Supervisor can initiate the Performance Review form in Self Service.  *Recommend employee initiates and completes self-evaluation first.  
If the supervisor initiates, they can draft their sections first and send to the employee second, and these initial comments are not viewable by the employee.  
(Supervisors must initiate the review for Merit staff.)

Step Two:

Employee will complete the form fields. This Includes:

- Universal Competencies Section (Required)
- Employee Goals and Accomplishments (Required by Department)
- Note: these can be typed in the box, completed on the form the HR Rep provided & then uploaded, or on a different document & uploaded.
Employee Initial Comments

Step Three:
Employee sends to Supervisor for Review.
Step Four:
Supervisor receives review in their Inbox in the portal (email notification). While the review form is in the supervisor's inbox, they can:
- add comments
- request additional feedback from other parties (employee does not see responses unless the supervisor checks a box to include them on the review form)
- attach applicable documents
- select an overall performance rating for the review period now, (may wait until after the discussion but prior to sending to employee). See definitions of the Performance Descriptors.

During this step the supervisor CAN see the employee's comments however, the employee CANNOT see the supervisor's comments.

At the end of this step the supervisor has three choices for the form:

**Return to the Employee** - will send back to the employee WITHOUT comments. This option is to be used if the employee would like/is instructed to make a change or edits to their self-evaluation.

**Save for Later**
- Select if you are still drafting and comments are not ready to share.

**Finalize Performance Review**
- It is recommended not to select this until after the performance discussion takes place. The form will remain in the supervisor’s workflow and the employee will not be able to view.
Step Five:

**Meeting with the employee** face to face (or remote if absolutely necessary)
Discuss performance review together, reviewing all comments and have an engaging conversation regarding each area on the review including, accomplishments, improvements, and goals, etc.

Step Six:

Required: Supervisor inputs final comments and chooses a rating, (if not completed in step 4).

Supervisor **finalizes form**.
Finalize the form during or after the review meeting with the employee.
Supervisor comments should only be edited prior to finalizing if discussed during the performance meeting.

Step Seven:

Employee enters final comments.
**Employee acknowledges** the review discussion by **Finalizing** the form.
Employee **must** acknowledge prior to **October 31** for form completion.

*Acknowledgement does not mean the employee agrees but simply acknowledges they received the form and a discussion took place.*