Today’s Refresher

- Thanks for your help
- The newly-developed Performance Review Form
- Refresher session on the PR Submission Process
- Noteworthy topics
- Q&A
Today’s Refresher

• This year, HR will not announce a deadline for supervisors/managers to submit reviews to HRLs
• However, you should work with your internal leadership to determine an appropriate deadline for your departments/units, and then share that deadline in your respective departments
• Performance Reviews are due to HR on Friday, July 19, 2019
Newly-developed Performance Review Form

<table>
<thead>
<tr>
<th>Employer's Last Name:</th>
<th>Review Period:</th>
<th>June 1, 2019 – May 31, 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employer's First Name:</td>
<td>Department:</td>
<td>Dept. of Information Technology</td>
</tr>
<tr>
<td>Banner ID:</td>
<td>Division Code:</td>
<td></td>
</tr>
<tr>
<td>Job Title:</td>
<td>Is Job in a Job Family?</td>
<td>No</td>
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</table>

## Performance Review Form

**Job Duties / Responsibilities / Position Goals / Previously Identified Development Needs**

**Setting expectations:**
- List as few as five and up to ten job duties, responsibilities, position goals, or previously identified development needs.

**Conducting the review:**
- Add comments on how well the employee performed these pre-established expectations.
- Identify one or three desired behaviors, present or absent, that contributed to the resulting outcome. For suggestions, visit the [Observation Behavior](website) website.
- Add any development opportunities to optimize output for the upcoming year.
- Finally, rate each pre-established expectation.

### Observations
- Performance is consistently superior and significantly exceeds the expectations for this job.
- Performance is consistently excellent and significantly exceeds the expectations for this job.
- Performance is consistently above average and significantly exceeds the expectations for this job.
- Performance is consistently average and meets the expectations for this job.
- Performance is consistently below average and falls below the expectations for this job.
- Performance is consistently poor and significantly falls below the expectations for this job.

<table>
<thead>
<tr>
<th>Observation</th>
<th>Excellent</th>
<th>Above Average</th>
<th>Average</th>
<th>Below Average</th>
<th>Poor</th>
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<tbody>
<tr>
<td>1. Job Duty/Responsibility/Position goal/Previously Identified development need</td>
<td>Rating</td>
<td>Rating</td>
<td>Rating</td>
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<td>2. Job Duty/Responsibility/Position goal/Previously Identified development need</td>
<td>Rating</td>
<td>Rating</td>
<td>Rating</td>
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<tr>
<td>3. Job Duty/Responsibility/Position goal/Previously Identified development need</td>
<td>Rating</td>
<td>Rating</td>
<td>Rating</td>
<td>Rating</td>
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Important Information

- Vice Presidents and Deans will make the decision or delegate the choice as to which form will be used within their respective department/unit.
- To maintain fair and consistent administration of the performance process, it is essential that all employees whose merit increases would be determined by the same supervisor/manager/department head be evaluated using the same performance review form.
A Division Performance Ratings Spreadsheet (DPRS) has been sent to HRL’s and includes all full time and part time employees in their division.

- Save a copy of the original DPRS to prior to entering any ratings.

<table>
<thead>
<tr>
<th>HRL</th>
<th>Dist</th>
<th>Division Des</th>
<th>Title</th>
<th>Department</th>
<th>Last Name</th>
<th>First Name</th>
<th>ID</th>
<th>Review Date</th>
<th>Rating</th>
<th>Comment</th>
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</table>
Process-in-brief

1. Verify information
2. Alphabetize Reviews
3. Input information into DPRS
4. Submit alphabetized and verified reviews, and DPRS to Penny Houston
HRL Action Steps

• Verify that the review contains
  1. Employee Name as listed on the DPRS
  2. Employee Banner ID as listed on the DPRS
  3. Division code
  4. Supervisor Name
  5. Supervisor Banner ID
  6. Overall Rating Score
  7. Signature and Date of Supervisor
  8. Signature and Date of 2nd Level Manager
  9. Signature and Date of Employee
  10. HRL signature validates all of the above
HRL Action Steps (continued)

• If all information is included and accurate, sign and date and proceed to next step

• If information is missing or inaccurate:
  • Record the performance review rating in the Division Performance Ratings Spreadsheet
  • Return to supervisor for correction
  • Supervisor should then return the corrected review to the HRL for submission to HR

• If any content or ratings are changed after the employee has signed the review, it must be reviewed, signed, and dated once again by the employee
HRL Action Steps (continued)

- Verify the names and Banner ID’s are identical to their listing on the DPRS
- Enter the date of review, and overall rating
- Alphabetize Performance Reviews
- If the Performance Review Form does not have a division code field, add it to the top left hand corner
- Save a copy for your HRL records
Who Needs a Review?

- A performance review is not required if the employee
  - Terminates
  - Retires
  - Passes Away
- Notate these employees with a 9 in the overall rating column and add comment in the section provided
- Transfer employees should have review from previous supervisor. Current supervisor uses it and Initial Training Review (90-day) as applicable.
Who Needs a Review? (continued)

• A performance review is required if the following criteria occurs during the performance year. (June 1, 2018 – May 31, 2019)
  • A hire date prior to December 1, 2018
  • Post December 1 hires for whom a merit increase has been submitted
Date to Remember

- July 19\textsuperscript{th} - Deliver to Human Resources/Penny Houston alphabetized paper copies of performance reviews, and a paper copy of the DPRS
- July 19\textsuperscript{th} - Email the electronic copy of the DPRS to Penny Houston
• Direct supervisors/managers to the Performance Management website
• If there is an employee missing from DPRS add their information
• If there is an employee on your DRPS that is not reviewed by your department indicate with a 9 in the ratings column
• The 2nd level manager signature is required prior to the face to face with the employee
The Division of Internal Auditing has been requesting reports of completed vs. non-completed reviews by department
Questions

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