Completing the Performance Review in PeopleSync: A Guide for Employees and Managers

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1. Performance Review Process Workflow

The performance review process is made up of five steps:

1. **Goal Setting:** At beginning of the year, the employee submits goals which the manager reviews and approves. (For this step, refer to the Goal Setting tip sheet.)
2. **Employee Self Evaluation:** The employee completes the Self Evaluation.
3. **Manager Evaluation:** The form routes to the manager and the manager completes the Manager Evaluation section.
4. **Discussion and Feedback:** The manager and employee discuss the performance.
5. **Acknowledgment:** The employee and manager acknowledge the form.

2. Employee Self Evaluation

1. Click on "**Self Evaluation: NYU WSQ…**" form on the **PeopleSync homepage**. (Or click on the **Inbox icon** on the upper right corner and select the form.)

2. You will see two buttons: Click on **Go to Guided Editor** or **Go to Summary Editor**.

- **Guided Editor** allows you to fill out the form by each section. See page 9 for an image of the form's navigation bar and menu.
- **Summary Editor** allows you to complete the form on one page. (If you change your mind, you can always switch to Guided Editor by selecting the **Guide Me** button.)

3. **Overview of Form.** The form has various sections and includes fields for your Ratings and/or Comments. The Review Period is shown on the upper left corner.

a) **Sections.** Below is a general sample of sections, but note the form varies by department. (You may see an additional section that is not listed below. Complete the content on the form, referring to the instructions in the Guided Editor. Reach out to your HR Partner if you have any questions.)

- **Goals**. This is often referred to as *Job Responsibilities, Goals and Priorities*. If you do not see goals, move on to page 9 for a guide on adding goals.
- **Behaviors.** This is often called *Competencies* or *Valued Behaviors*.
- **Overall Performance.**

b) **Form fields.** Under the **Employee Evaluation** header, **complete the Comment and Rating fields.** (Note: some sections may exclude a Rating field).

- **Edit.** Click on the field name to begin **editing** OR click on the **pencil icon** located on the upper right.
- **Save.** To **save** your changes, click outside the field OR click on the **check mark icon** located on the upper right.
- If you are using Guided Editor, click **Next** to move on the next section.

4. When you are finished, click the **Submit** button. **The form routes to your Manager's PeopleSync Inbox.**

Tip: Not ready to submit? Click Save for Later. The form saves to your PeopleSync Inbox. You can also click on the PDF button located in the upper right corner.

3. Manager Evaluation

1. Click on "**Manager Evaluation: NYU WSQ…**" on the **PeopleSync homepage**. The name of the employee is included in the form's title. (Or click on the **Inbox icon** on the upper right corner and select the form.)

(Note: If you have many direct reports and would like to choose among a list of forms, click on the Team Performance button on the homepage. Click on "My Team's Performance Reviews".)

2. You will see two buttons. Click on **Go to Guided Editor** or **Go to Summary Editor**.

- **Guided Editor** allows you to fill out the form by each section.
- **Summary Editor** allows you to complete the form on one page. (If you change your mind, you can always switch to Guided Editor by selecting the **Guide Me** button.)

3. **Overview of Form.** The form is made up of various sections. Below is a general sample, but note that the form can vary by school or unit. You may see an additional section that is not listed below. The Review Period is shown on the upper left corner.

- **Goals**. This is often referred to as *Job Responsibilities, Goals and Priorities*.
- **Behaviors.** This is often called *Competencies* or *Valued Behaviors*.
- **Overall Performance.**

4. The Manager evaluation is separate from the Employee's evaluation—you will complete the manager portion of the form. Find the **Manager Evaluation** header. Next to this is the

Employee's completed Self-Evaluation section. Complete the Manager **Rating** and **Comment** fields.

- **Edit.** Click on the field name to begin **editing** OR click on the **pencil icon** located on the upper right.
- **Save.** To **save** your changes, click outside the field OR click on the **check mark icon located** on the upper right.
- If you are using Guided Editor, click Next to move on the next section. At the end of Guided Editor, you will see a "Summary" page with all the sections.
- If the employee's section needs to be revised, you can send the form to the employee's Inbox. Click on the **Send Back** button.

5. Once the form content is complete, you are now at the step of discussing the evaluation with the employee.

- Click **Save for Later** button. *(Note: We recommend **Save for Later** because you cannot edit the evaluation after submitting. It is advised that you save the form in case the form needs to be edited after discussion.)*
- To facilitate the performance discussion, share the form with the employee. You can download the form and provide a copy or email it.

6. After your discussion has taken place and the form content is finalized, click **Submit**.

7. On the next screen you will see **either:**

a) **Up Next [Your Name] / Performance Review ready to share with employee.**

- Click the **To Do button**.
- Complete **To Do**. Review the text. (Note: to edit the form at this stage, you will need to contact PeopleLink.)
- Review communications from your HR Partner, as they may indicate specific dates to submit this step.
- Click **Submit** and **Done. The form routes to the Employee's Inbox**.

OR

b) **Up Next HR Partner.** For some departments the form may first route to HR for review. Once HR has reviewed it, they submit the form back to you and you will see the To Do step above.

Please note: <u>Stop! Do not perform the Acknowledge steps below until the Employee and Manager have discussed the performance evaluation.</u>

4. Employee Acknowledgment

1. On the **PeopleSync homepage,** click on "**Manager Evaluation: NYU WSQ…"** (Or click on the **Inbox icon** on the upper right corner and select the form.)

2. At the top you will see **Provide Employee Review Comments**. On this page you will see: an **Acknowledgment** section and the **completed evaluation form**.

a) Review the text about acknowledging the form. Under **Employee Acknowledgment,** click on the **Status** field (or click on the **pencil icon**). Choose one:

- Acknowledge Review without Comments
- Acknowledge Review with Comments

Click the **check mark icon** to save. Click **Submit**. The form routes to the **Manager**. Click **Done.**

5. Manager Acknowledgement

1. On the **PeopleSync homepage,** click on "**Manager Evaluation: NYU WSQ…"** (Or click on the **Inbox icon** on the upper right corner and select the form.)

2. You will see: **Provide Manager Review Comments** at the top. On this page you will see: the **Employee's** completed **Acknowledgment** section. Next to this is **the Manager Acknowledgment** section. This page also displays **completed evaluation form**.

a) Review the text about acknowledging the form. Under **Manager Acknowledgement** click on the **Status** field (or click on the **pencil icon**). Choose one:

- *Acknowledge Review without Comments*
- *Acknowledge Review with Comments*

Click the **check mark icon** to save. Click **Submit**. Click **Done**.

The Performance Review Process is complete!

Common Questions

- **I did not complete the Goal Setting step at the beginning of the year, what should I do?** Add the goals directly into the form.

- **I submitted my self-evaluation in error. Now what?** If you submitted your self-evaluation but need to review or edit it again, first contact your manager. Your Manager can send the form back to you. If you can't get in touch with your Manager, contact PeopleLink and the form can be sent back to your Inbox.

- **I am a Manager, how can I send back the form to the employee?** Click on the Send Back button located at the bottom of the form. A popup appears and you will need to enter in a Reason.

- **I received a self-evaluation for an employee who is *not* in my department/does not report into me.** The forms route based on who is assigned to the supervisory organizations (sup orgs) that you manage. Contact PeopleLink so that we may review the assignment and assign it to the correct manager. We recommend that you also contact your HR Partner so that a permanent sup org change (if needed) can be made for the next year's process.

How to Add Goals

1. In the form click **Add.** You will see the fields below. (Note: You can use the optional, **"Click on Existing Goal"** checkbox to select among a list of current goals. This will prepopulate the fields which you can then edit.)
2. Complete the fields below as indicated. Click the **pencil icon** to edit. Click the **check mark icon** to save your changes. Click the **X icon** to delete.

Goal	This should be a brief title of the goal.
Description	The main content for your goal - your objectives, timelines, success criteria and other important details.
Category	(Optional) Categorize the goal into a common goal theme.
Status	Select *Not Yet Started* or *In Progress*. If you are entering these goals at the end of the review period then you may select "Completed".
Supports	*(Optional)* If your department has created organization goals, you can associate your individual goals by selecting that organizational goal here. (Note: you will only see choices if your department has created organization goals.)
Due date	Indicate the date that the goal is due. The dates should fall within the review period or in the future.

For tips on creating goals visit:

- **PRO: 402 Performance Communication at NYU.** This course, available in iLearn, includes a section on S.M.A.R.T characteristics which make up an effective goal.
- NYU's Performance Communication web page.

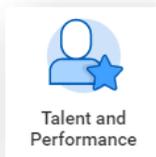3. Continue to click **Add** and then repeat the steps to add more goals.

Downloading Form

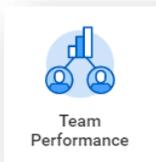- If you are in the form click the **PDF** button located in the upper right corner.

- Or click on the Talent & Performance or Team Performance Button (see below).

Form Storage

Employees: To access your current and past evaluation forms click on the Talent & Performance button on the PeopleSync homepage. Click the **Reviews** link. To download a form, click **Create New PDF** button.


Managers: To access current and past evaluation forms of your direct reports, click on the Team Performance. button on the PeopleSync homepage. Click the **My Team's Performance Reviews** link. To download a form, click **Create New PDF** button.

Images of Form Navigation and Buttons

Guided Editor:

- Click the arrows at ends of scroll bar (A) to move forward/backward in the form or click on the **Next** and **Back** buttons (B)

- Click on the arrow next to the section name to view a menu of sections (C)
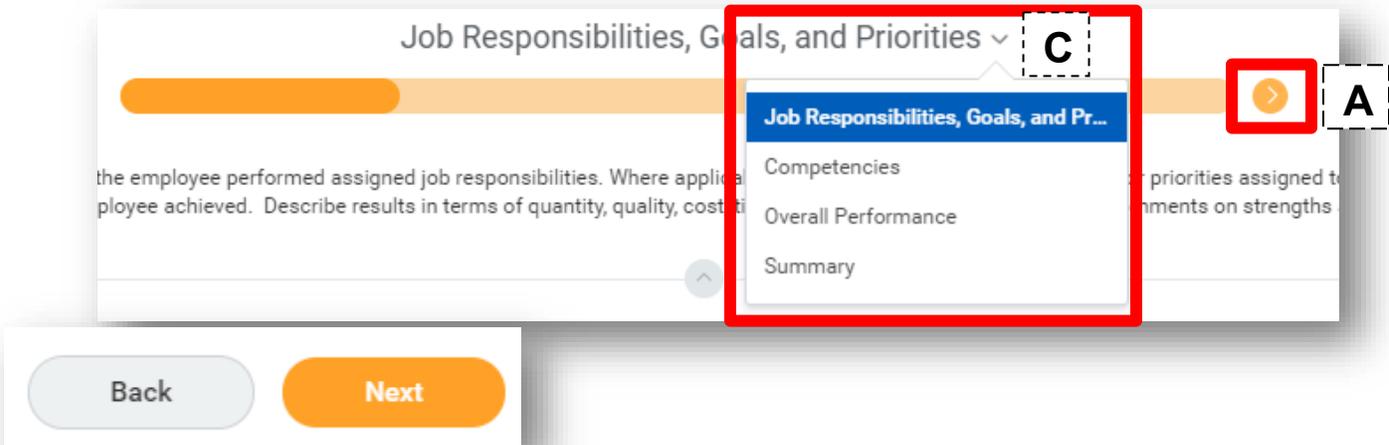
Editing and Saving Changes in the Form:

- Click the **pencil icon** to edit the fields (D), the **X icon** to delete E and the **check mark icon** to save (F).

- To expand the **Comment** field, click the arrows on the upper right corner. (G)