COMPLETING THE SIX-MONTH REVIEW IN TALENT MANAGEMENT—MANAGER ROLE

MANAGER ROLE

Note: screen displays may differ slightly from the ones shown in this tutorial.

Legend:

- Blue rectangle callouts indicate instructions to user
- Orange rounded rectangle callouts indicate information for user
- Red boxes draw attention to item inside
For a list of which tasks you need to complete for the performance appraisals assigned to you, click on **Home>Scheduled Tasks**.
STEP ONE: Opening the appraisal.

Click on the employee to be reviewed.

Optional: Check the box to view completed tasks.

Click on the employee to be reviewed.
A quick overview. Stacked tasks are opened after the previous task is complete.
Step Two: Select the Appraisal factors.

Click the drop down box to select the rating for each factor.

Complete all required rating factors and any comments. Items designated with a red asterisk are required.
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Appraisal Factors

10. Attitude

Average

11. Dependability

Average

12. Other:

Above Average

*Please list other appraisal factor as applicable:

Ability to make presentations that are concise and informative.

Click on Save and Exit or Save and Continue to save your inputs.
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Comments are required for each Overall rating comment box.

Summarize the performance over the evaluation period:

Comments:

This is an above average employee overall who can benefit from some additional professional development opportunities.

Indicate or list suggested ways, if any, employee can improve job performance:

Comments:

Attend two seminars per year and find a mentor to shadow in the areas that need strengthening.

Overall rating of staff employee performance:

Exceeds Job Req.

Comments:

I'm confident that this employee will demonstrate future growth and be a valuable asset to the team.

Click Submit.
Note: The overall rating will only display after you return to conduct and acknowledge the review meeting. This is to prevent the reviewee from seeing the rating prior to the review meeting in his or her account.

Note: To acknowledge the review meeting, return to the review by repeating Step One. Click through each screen until you reach Step Three, i.e., the Summary screen, below.
Step Three. Conduct and acknowledge the Review Meeting.

You may print the review to prepare for the review meeting by clicking the Options down arrow.

Optional: Click the question mark for insight into the rating scale.
### Rating Scale

<table>
<thead>
<tr>
<th>Rating</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Does Not Meet Job Requirements</strong></td>
<td>Overall performance of job responsibilities and productivity is sometimes at a level below what is normally expected or required.</td>
</tr>
<tr>
<td><strong>Meets Job Requirements</strong></td>
<td>Overall performance of job responsibilities and productivity is at a level that is normally expected or required.</td>
</tr>
<tr>
<td><strong>Exceeds Job Requirements</strong></td>
<td>Overall performance of job responsibilities and productivity is at a level that is often (&gt;50% of the time) above that which is normally expected or required.</td>
</tr>
<tr>
<td><strong>Outstanding</strong></td>
<td>Overall performance of job responsibilities and productivity is at a level that is usually (&gt;70% of the time) above that which is normally expected or required.</td>
</tr>
<tr>
<td><strong>Excellent</strong></td>
<td>Overall performance of job responsibilities and productivity is at a level that is consistently (&gt;90% of the time) above that which is normally expected or required.</td>
</tr>
</tbody>
</table>

Rating scale insight.
As noted, at this point, you should have already conducted the review meeting; next, go to Step Four by clicking Next.
Step Four. Acknowledge the Review Meeting.

Click **Back** to review or change an input prior to submitting. Click **Submit** to submit the acknowledgment. This will trigger an email that will notify the employee to acknowledge receipt of the review in Talent Management. **Note:** The employee will be able to see the entire review once you click Submit.
COMPLETING THE SIX-MONTH REVIEW IN TALENT MANAGEMENT—MANAGER ROLE

2015 Six-Month Review

Submit Review

You will not be able to modify once you have submitted. Are you sure that you want to submit now?

Cancel  Submit

Click Submit.

Review Meeting

This is the final step in the Appraisal process for the supervisor. Your electronic signature on this page indicates that you have completed the appraisal and reviewed it with your employee. Please click the Acknowledgment checkbox and acknowledge you have reviewed the appraisal with the employee.

Be sure you are done prior to clicking Submit. Once this is selected, only an HR system administrator can reopen the review.
Return to Home>Scheduled Tasks to complete any other employee appraisals assigned to you.
You can always see the progress of your reviews here. Due dates may vary depending on the step you are in for the appraisal and the date of completion of the previous step for the appraisal.

Once an employee acknowledges a review, it will go from being an In Progress task to a Completed task. Click “Show completed and expired tasks” to view all completed reviews. To re-enter the completed review for viewing or printing, click on the review.
Once the employee has acknowledged the review, the Employee Acknowledgment step circle will show as solid inside the review. You may print a copy of the review for your records by clicking on Options in the upper right corner, but Talent Management will retain a permanent copy of all reviews.