Guide to Team Overview

The performance review process is made up of a series of steps that integrate feedback from colleagues, the employee's self-assessment, and manager's assessment of the employee's performance, which is reviewed during a one-on-one discussion with the manager and employee. In this guide, learn how to use Team Overview to track and manage the performance review process for your team.

It's Easy

The Team Overview tab provides a one page status summary of each of your direct report's performance review forms so you can monitor your team's progress. Buttons turn orange to alert you when your action is required, making it easy to complete process steps and keep the review process on schedule.

1 Getting Started

Select Performance from the drop-down navigation menu and click the Team Overview tab.

2 Ask for Feedback

Click Ask for Feedback to send emails asking selected individuals to review the employee's performance, for input to the employee's evaluation.

3 Self-Assessment

After the employee has completed the Self-Assessment, his/her overall performance score is listed for reference.

4 Manager Assessment

Click Review to rate and comment on the employee's performance, to complete the Manager Assessment.

5 Team Rater

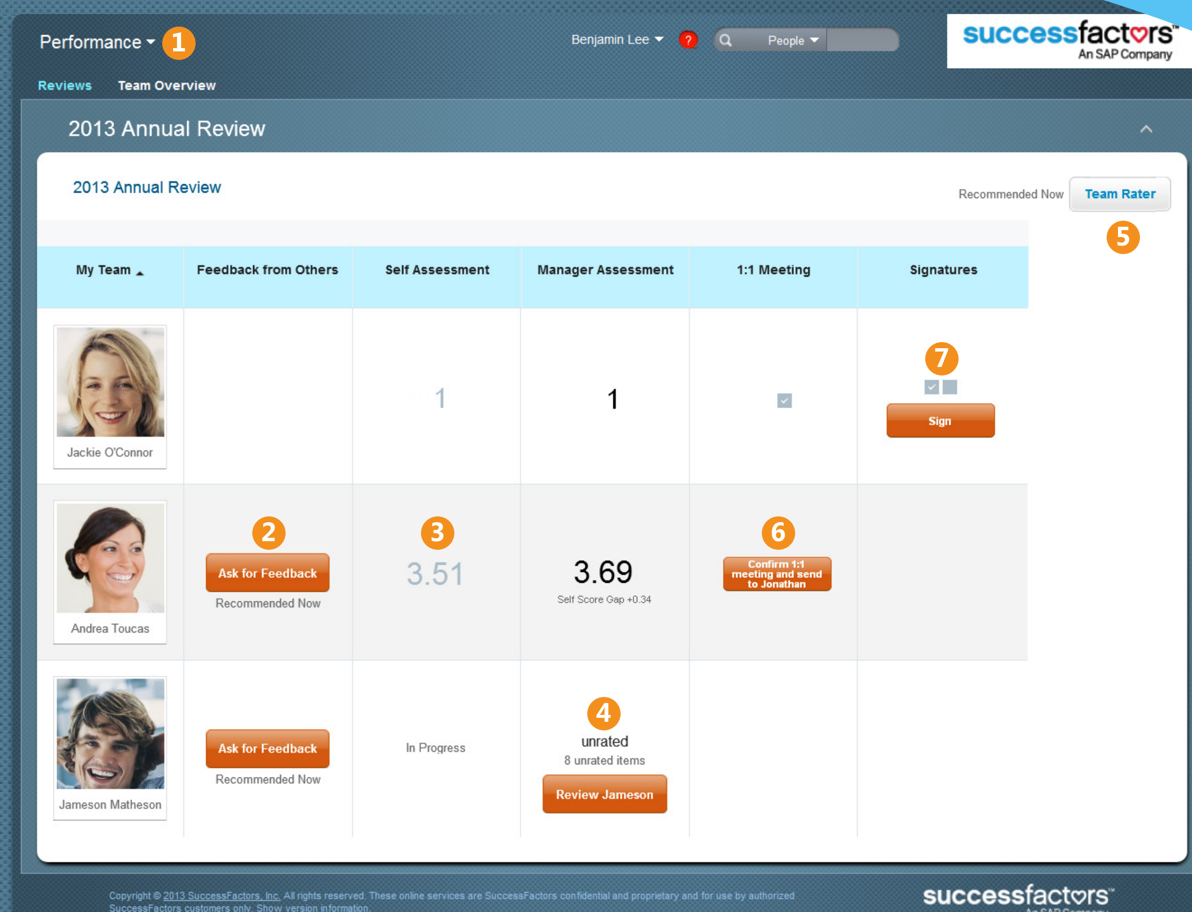
Click Team Rater to enter and stack rank your direct reports' competency ratings after the employees have completed their Self-Assessments.

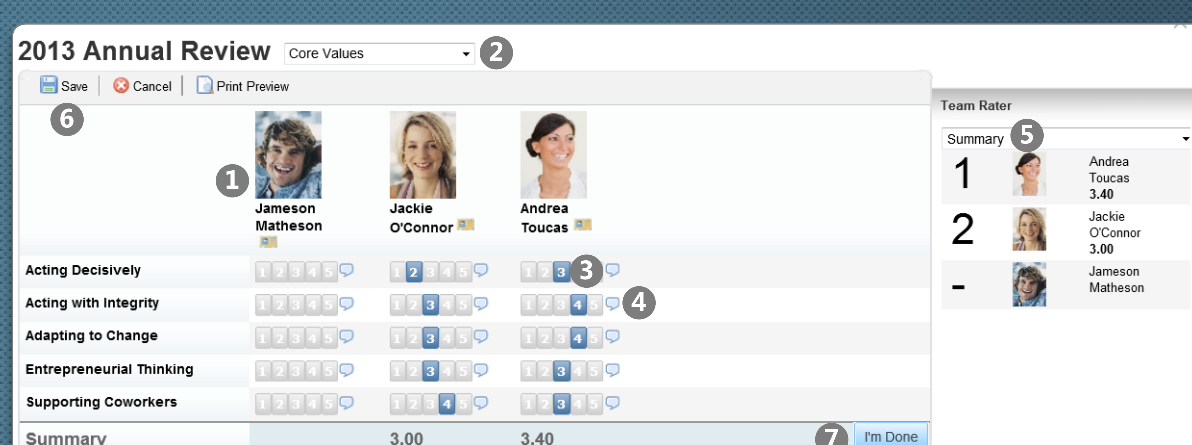
6 1:1 Meeting

Meet with your employee to discuss the results of the performance review. Afterwards, click Confirm 1:1 meeting and send to Jonathan to confirm the meeting took place.

7 Signatures

The performance review form is sent to the employee for electronic signature and then returned to you. Click Sign to electronically sign the form, confirming the discussion took place. This completes the review process.





Spotlight: Using Team Rater

The Team Rater tool is used to compare direct reports' competency ratings side-by-side and make adjustments as needed before completing the Manager Assessment step. Click Team Rater to access the tool.

1. A list of employees and their competency ratings are displayed.
2. Use the drop-down menu to view core values or job specific competencies.
3. Click a button to enter or change a competency rating.
4. Click the comments icon to add notes on reasons for the change.
5. Use the drop-down menu to view how employees rate overall or on a specific competency.
6. Click Save to save changes.
7. Click I'm Done to return to the form. Ratings are automatically updated in the employees' performance review forms.

NOTE: You may only stack rank employees who have completed their self-assessment.