Complete an Annual Review

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PURPOSE

On January 1st the new Annual Review will be launched for all eligible state employees who were hired before 7/1/2016. Each employee should have an evaluation completed to review their performance for the previous year. The review process will consist of five steps: the employee self-review, manager review, indirect sign-off, presentation and sign-off, and the employee sign-off.

The table below shows the steps involved in the performance review process and the recommended number of days to allow for each step. Your agency may have a different timeframe for you to follow.

Step 1	Step 2	Step 3	Step 4	Step 5
Employee Self-Review	Manager Review	Indirect Manager Sign-off	Manager Presentation	Employee Sign-off

LOG IN TO THE EMPLOYEE DEVELOPMENT CENTER

1. The Employee Development Center can be accessed from this page, http://nebraska.csod.com/.

2. Type your User Name, press tab and then type your password.

3. Click Sign In (or press Enter).

Complete an Annual Review

STEP 1 – EMPLOYEE SELF-REVIEW

The first step in an annual review is for the employee to complete the self-review; follow the steps below to complete the employee self-review step:

1. Select Performance Review Summary under the Performance menu or click the Performance button on the Welcome Page.

2. Click the Annual Self Review option.

   The review will open to the Overview page. The Options button in the upper-right corner can be used to attach files to the review, download a printable PDF copy of the review, and perform other actions.

3. To get started on the self-review, click the Get Started button at the bottom of the page.

4. The Self-Review section consists of a five questions in addition to a few optional comment boxes. The first questions are regarding competencies; to pick an answer, click the Select box and choose a competency:

   As an employee one of my top two competencies is:

   After selecting a competency, enter any comments to support the selection:

   I believe this is one of my top competencies because:

   In the throes of our new nation I have proven adaptable by creating unprecedented financial systems to meet the constantly-changing needs of our nation-states.

5. Complete the remaining questions, which follow the same structure detailed above. Once finished, click the Submit button at the bottom of the page to finish the step and send the evaluation to the reviewer.

STEP 2 – MANAGER REVIEW

The second step in the annual review process is for the reviewer (typically the employee's manager) to complete the evaluation on the employee.

1. Select Performance Review Summary under the Performance menu or click the Performance button on the Welcome Page.

2. Click the Annual Review for *Employee Name* option to open the evaluation.

   The review will open to the Overview page. The Options button in the upper-right corner can be used to attach files to the review, download printable PDF copy of the review, add a co-planner, and other actions. The Reopen Step button at the bottom of the page can be used to send the evaluation back to the Self-Review step if needed.

3. To start the Manager Review step, click the Get Started button at the bottom of the page.


4. The first section in the Manager Review step is a review of the employee's Self-Review step. This section is for review of the employee's input and there is nothing to rate comment on.

5. To continue to the Competencies section, click the Save and Continue button at the bottom of the page.

The Competencies section is where ratings and comments are entered surrounding the employee's performance in several state-wide competencies; employees who are managers of others will have 12 competencies to rate and employees who are not managers will have 8 competencies. The first competency, Accountability, is shown below with items of interest highlighted:

- The Action Button (▼) can be used to view additional details about the specific competency.

- The Select box is used to choose a rating for this competency on a 1 through 5 scale, from *Does Not Meet* to *Greatly Exceeds*. An explanation of the ratings can accessed by clicking the question mark icon (❓) to the right of the Select box.

- The Comments box is used to enter comments to support the rating given to the employee. Premade are available as a base for your own comments; to view the premade comments, click the speech bubble icon (🗨) above the comment box and to the right.

6. Enter a rating and supporting comments for each competency in this section.

7. Once done, click the red Save and Continue button at the bottom of the page to move to the next section, the Goals.

The Goals section contains goals that have been set up for the employee, typically by the employee's manager. Goals work similarly to competencies and are rated on a 1 through 5 scale.

8. Select a rating for each goal by clicking the Select box and enter any comments to support the selected rating (the comment assistant is not available for this section as goals are created manually).

Note: If no goals appear, the employee does not have any active goals during the review period. Goals are not required by all agencies; if omitted, only the competencies will be scored. Goals can be modified and created at any time as outlined in the user guides available at http://das.nebraska.gov/user_guides/.

9. Once rated, click the red Save and Continue button to move to the Summary section.

The Summary section will show the rating for each section in the review as well as the overall score. A section will display N/A if there is no rating for a particular section; the overall score will only look at sections that display a rating.

10. Click the Submit button to finish the step and send the review to the Indirect Review step.

STEP 3 – INDIRECT SIGN-OFF

The third step in the annual review process is for the reviewer's manager to look through the evaluation, sign it, and add any comments if desired. The indirect manager does not enter any ratings on the evaluation.

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1. Select Performance Review Summary under the Performance menu or click the Performance button on the Welcome Page.

2. Click the Annual Indirect Manager Review of *Employee Name*.

   The review will open to the Overview page. To review the information entered by the employee in the Self-Review step

3. Click the Get Started button at the bottom of the page.

   Get Started

4. The first section is a review of the employee's Self-Review; this section shows what the employee entered during the Self-Review step. After reviewing the information, click the Save and Continue button at the bottom of the page to continue to the Competencies section.

5. The Competencies section displays ratings and comments entered by the reviewer on the employee's performance in state-wide competencies. Review the ratings and comments, then click the Save and Continue button at the bottom of the page to continue to the Goals section.

6. The Goals section displays the reviewer's ratings and comments on the employee's performance surrounding their goals, which are typically set up by the employee's manager. After reviewing the information, click the Save and Continue button to move to the Summary section.

7. The Summary section shows the rating for each section, as well as the overall review score. If a section does not contain any items to rate, the score will show N/A and will not be included in the overall rating. Click the Next button to move to the Sign-Off section.

8. The Sign-Off section allows the indirect manager to sign the review and enter any comments. Check the box that says "I acknowledge…" then click the Sign button to sign the review:

   Indirect Manager

   ☐ I acknowledge that providing my electronic approval is equivalent to signing this document and I understand that my electronic signature is binding.   **Sign**

   | **B** *I* S̶ U̲ | 1≡ :≡ | ≡ ≡ | ABC✓ |

   Keep up the great work!|

9. Comments can be entered below the signature; once done, click the Submit button to finish the step and send it back to the reviewer for the Presentation and Sign-Off step.

STEP 4 – PRESENTATION AND SIGN-OFF

The fourth step in the annual review process is for the reviewer to present the evaluation to the employee, enter any comments, and sign it.

1. Select Performance Review Summary under the Performance menu or click the Performance button on the Welcome Page.

2. This page lists all currently assigned performance review steps – click the Annual Review for *Employee Name* option to open the evaluation.

The review will open to the Overview page. To go over the information entered by the employee in the Self-Review step again, as well as the other steps

3. Click the Get Started button at the bottom of the page. To skip straight to the presentation, click the Presentation section in the sections list to the left of the review:

The Presentation section is used to document the date the evaluation was presented to the employee. Enter a date by clicking the calendar icon:

Please record date the results were presented, reviewed, and discussed with employee.

4. Click the Save and Continue button to the Summary section.

5. The Summary section shows the rating for each section, as well as the overall review score. If a section does not contain any items to rate, the score will show N/A and will not be included in the overall rating. Click the Next button to move to the Sign-Off section.

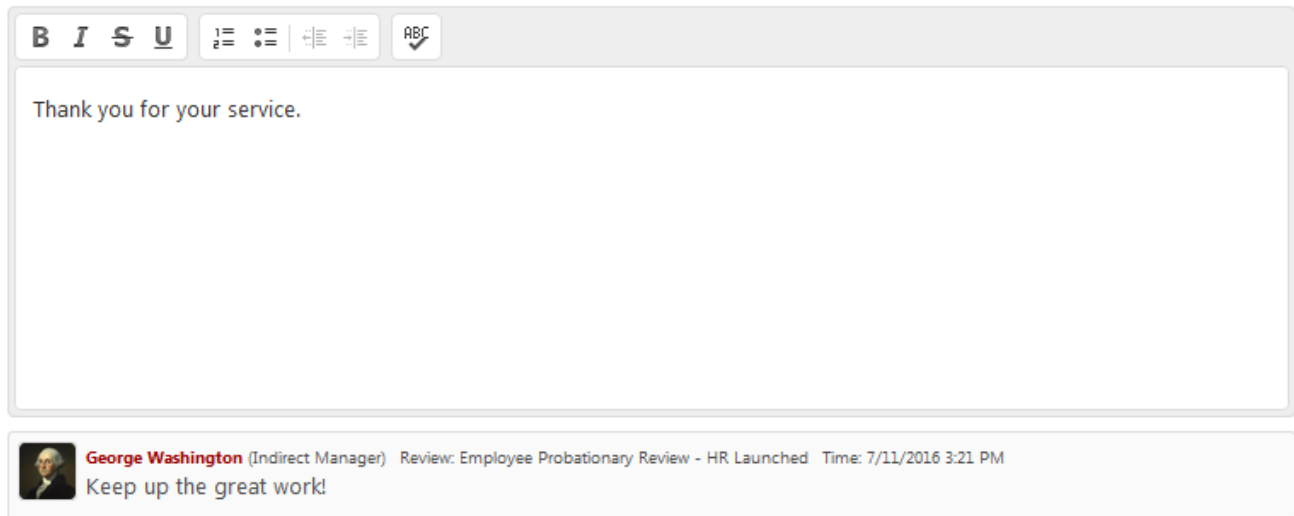6. To sign the review, check the box that says "I acknowledge…" then click Sign button:

Manager

☐ I acknowledge that providing my electronic approval is equivalent to signing this document and I understand that my electronic signature is binding.

Sign

7. Add final comments (not required)

George Washington (Indirect Manager) Review: Employee Probationary Review - HR Launched Time: 7/11/2016 3:21 PM
Keep up the great work!

8. Once filled out, click the Submit button to finish the step and send it to the employee for their final signature and comments.

STEP 5 – EMPLOYEE SIGN-OFF

The final step in the annual review process is for the employee to go through the review, sign it, and add any final comments if desired.

1. Select Performance Review Summary under the Performance menu or click the Performance button on the Welcome Page.

2. Click the Annual Self Review option.

3. The review will open to the Overview page. To review the information entered in the Self-Review step, click the Get Started button at the bottom of the page.

4. After reviewing the Self-Review step, click the Save and Continue button to review the information entered by the reviewer in the Competencies section.

5. The ratings and comments entered by the reviewer in the Competencies section can be reviewed in this section; once done, click the Save and Continue button to move to the Goals section.

6. The Goals section displays the reviewer's ratings and comments surrounding any goals that have been set up for the employee. After reviewing the information, click the Save and Continue button to move to the Presentation section.

7. The Presentation section verifies the date the review was presented to the employee. Click the Save and Continue button to move to the Summary section.

8. The Summary section shows the rating for each section, as well as the overall review score. If a section does not contain any items to rate, the score will show N/A and will not be included in the overall rating. Click the Next button to move to the Sign-Off section.

9. To sign the review, check the box that says "I acknowledge…" then click the Sign button:

Employee

☐ I acknowledge that providing my electronic approval is equivalent to signing this document and I understand that my electronic signature is binding.

Sign

Note: Final comments can be entered below the signatures, but are not required; the reviewer's and indirect manager's comments can be reviewed below the comment box.

10. Once done, click the Submit button to finish the review.

APPENDIX

SELF-REVIEW QUESTIONS

The Self-Review step now only consists of one page with eight questions. These are the eight questions that will appear on the Self-Review page.

1. As an employee/manager one of my top two competencies is:

2. I believe this is one of my top competencies because:

3. As an employee/manager my other top competency is:

4. I believe this is another of my top competencies because:

5. One competency which I could improve on as an employee/manager is:

6. I believe development in this area is important because:

7. An accomplishment I am most proud of:

8. Do I have the necessary tools to do my job?

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The list of competencies on an employee's review will vary depending on whether the employee is a manager of others or not. Employees who are not managers will see eight competencies and those who do supervise others will see a total of 12 – the eight employee competencies and four more that are specific to managers.

Competency	Definition	Template (Manager/Employee)
Accountability	Takes responsibility for own conduct and adheres to policies and procedures. Portrays dependability, including regular and reliable attendance.	Employee
Adaptable	Demonstrates a high degree of adaptability to change and focus on progress. Initiates innovative improvements both in reaction to change and in anticipation of shifting customer need, business process and priorities, or available resources.	Employee
Continuous Development	Seeks constant improvement through formal training and on-the-job learning opportunities. Welcomes new technology and strives to be proficient. Demonstrates acquired knowledge through improvement in individual work and team contribution.	Employee
Customer Service	Serves each internal and external customer with exceptional attention to each specific need. Listens carefully, communicates kindly and professionally, demonstrates patience, and solves problems creatively while representing the mission and values of the agency at all times.	Employee
Fulfill Mission and Vision	Consistently adheres to the mission and vision of the agency, division and/or work group. This is readily evident in all personal and electronic interactions with colleagues, internal customers, contractors and citizens.	Employee
Quality and Efficiency of Work	Maintains a consistent standard of quality, including attention to accuracy, efficiency, and quantity of work. Establishes or meets criteria and procedures to achieve an expected level of quality, productivity, or service.	Employee
Self-Manage	Requires minimal supervision while fulfilling all expectations of the position including time, quality, and budget commitments. Takes initiative to start projects, non-routine tasks, and successfully manages own time and priorities with little instruction.	Employee
Teamwork	Approaches work with the intent to cooperate and collaborate. Values the contributions of every stakeholder and works effectively with others, creating a positive and productive culture.	Employee
Leadership	Communicating a clear sense of directions and establishing priorities for the team. Treats people with dignity, respect, and fairness. Operates with integrity and honesty for the overall good of the team.	Manager
Performance Management	Invests time and attention to raising the level of performance for all direct reports. Monitor performance progress on an ongoing basis, provides individual feedback, and conducts scheduled reviews on time.	Manager
Staff Development	Coaches and develops others to perform and contribute to the organization and by communicating progress and providing opportunities to learn through formal and informal methods.	Manager
Team Morale and Engagement	Inspires a positive, productive team culture that empowers employees to achieve team and agency goals. Communicates frequently in a constructive and compassionate manner.	Manager

RATING SCALE

Rating	Definition	Score
Does Not Meet	Your performance is not acceptable; it does not meet the minimum expectations for this job.	1.0 – 1.4
Somewhat Meets	Your performance may have been successful in some areas, but falls below expectations. Your performance requires improvement to satisfy minimum expectations.	1.5 – 2.4
Meets	Your performance meets the expectations of the position and work is performed at the level expected. You are competent and productive.	2.5 – 3.4
Exceeds	You frequently exceed expectations and provide significant measurable contributions. You demonstrate a desire and ability to excel.	3.5 – 4.4
Greatly Exceeds	Your performance is consistently characterized by work of exceptionally high quality and is truly rare.	4.5 – 5.0

LINK HELP DESK CONTACT INFORMATION

The LINK Help Desk provides assistance for the following programs:

- The Employee Work Center
- The Employee Development Center

Email: as.linkhelp@nebraska.gov

Phone: 402.471.6234