

## END-OF-YEAR CONVERSATION

The performance management process provides managers and employees a framework for engaging in regular communication throughout the year about goals/expectations, performance, and employee development. The process should include dialogue rich with specific examples of expectations, actual performance, and impact during which both parties acknowledge and come to agreement on performance highlights that are then briefly summarized through documentation. *The End-of-Year Conversation process is initiated by HR*; however, your manager can initiate performance reviews throughout the year.

### Begin Employee Self-Evaluation

When the end-of-year conversation process is initiated, you will receive an **Inbox** task to complete a self-evaluation.

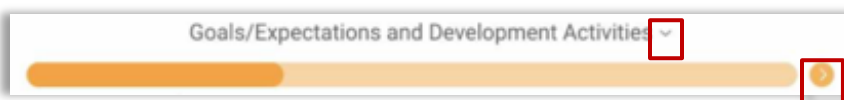
1. Navigate to your **Inbox**. Select the **Complete Self Evaluation: Self Evaluation: End of Year Review** task.  
*Note: Competency definitions will appear for your reference. Click X to close the information box.*
2. Select **Go to Guided Editor**. *Note: Do not select Go to Summary Editor. If you select Go to Summary Editor, to begin again, click Close and re-select the Inbox task.*



### Goals/Expectations and Development Activities

The Goals/Expectations and Development Activities section provides the opportunity for you to review goals/expectations and development activities, and describe accomplishments. The orange navigation bar will show you how much has been completed for the performance review process.

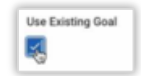
You can use the arrows to navigate from section to section or the **Next** and **Back** buttons.



3. Click **Add**  to add goals to the review.

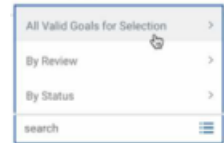
### To enter comments about an existing goal/expectation:

- a. Check **Use Existing Goal** to select goals/expectations that were established during the Goal/Expectation Setting process, as well as those that were modified during Check-In Conversations.



- b. Click **Prompt**  to select from the list of existing goals.




- i. **All Valid Goals for Selection:** Select from an alphabetized list of all goals set with the performance review cycle
- ii. **By Review:** Select goals added during specific review conversations (Kick-Off Goals/Expectations, Check-In Conversations, etc.)
- iii. **By Status:** Select goals according to their status



### To enter new goals identified since your last performance conversation:


- a. Do not check **Use Existing Goal**
- b. Enter Goal information including **Goals/Expectations and Development, Anticipated Outcomes/Description, Due Date, and Status** (Refer to the [Manage Goals](#) job aid for detailed instructions)

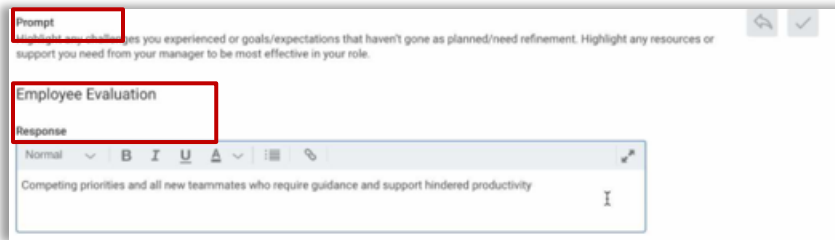




4. Enter comments in the **Employee Evaluation** section. Click the **Comment** box to add your comments related to on goal/expectation and/or development activity achievement.
5. Click **Save**  to complete the comment or **Undo**  to discard entry.
6. Click **Add** and complete steps 4 through 7 to add all applicable goals/expectations and development activities.
7. When all goals/expectations and development activities have been added with your comments, click **Next**  to continue to the **Questions** section.

### Questions



The **Questions** section provides the opportunity for the employee to provide more detailed information about accomplishments, challenges, and potential goals for the upcoming year.

8. Review the listed prompts.
9. Click the prompt or click **Edit**  to enter your response in the **Employee Evaluation Response** box.



10. Click **Save**  to complete the response or **Undo**  to discard entry.
11. When you have finished your response to each prompt, click **Next** to review a summary of the self-evaluation.

### Summary

12. Review the summary of your responses. To edit a response click **Edit**  to change your response directly from the **Summary** page or click **Guide Me**  to return to the Guided Editor.
13. Select one of the following:
  - a. **Submit:** Complete the **Self-Evaluation** and send it to your manager
  - b. **Save for Later:** Keep changes and exit
  - c. **Close:** Exit without saving changes

### Manager Review



1. Your manager will review your self-evaluation along with feedback received from colleagues.

2. If necessary, your manager may send back your submission with a reason for the send back request if edits are required.

To view the send back reason:

- a. Navigate to your **Inbox**
- b. Select the **Send Back** task
- c. Scroll to the **View Comments** section (bottom of page) to view the **Send Back Reason**
- d. To edit your response click **Continue where I left off** to return to the **Guided Editor** or **Go to Summary Editor** to change your response(s) directly from the **Summary** page

### Manager/Employee Meeting and Acknowledgement

1. The manager will schedule an in-person **Manager/Employee Meeting** to have engage in conversation about your End-of-Year Review. Following the meeting you will receive an **Inbox** task to acknowledge the meeting's occurrence and to provide your comments.
2. Navigate to your **Inbox**. Select the **Manager Evaluation: End of Year Review** task.
3. Click **Edit**  to input your acknowledgement.
4. Click **Prompt**  in the **Status** box to select **Acknowledge** (required).

*Optional:* Click the **Comment** box to add your comments about the conversation.

5. Select one of the following:
  - a. **Submit:** Complete the **End Of Year Review Acknowledgement** and send it to your manager for final review and comment
  - b. **Save for Later:** Keep changes and exit
  - c. **Close:** Exit without saving changes

