

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, managers can initiate performance reviews throughout the year.

Review Employee Self-Evaluation

When the end-of-year conversation process is initiated, the employee will receive an **Inbox** task to complete a self-evaluation. The manager will receive an **Inbox** task to continue the process once the employee has submitted their self-evaluation.

1. Navigate to your **Inbox**. Select the **Manager Evaluation: End of Year Review** task. Competency definitions will appear for your reference. Click **X** to close the information box.
2. Review employee self-evaluation related to Goals/Expectations and Development Activities. Employee comments are viewable beside the **Manager Evaluation** section.

To enter comments, click in the **Manager** section and provide your response.

Manager	Employee
Comment <div> Format ▼ B I U A ▼ ■ □ ↺ ↻ </div>	Comment TEST

3. Click **Next**.
4. Review employee self-evaluation related to the Questions section. Employee comments are viewable beside the **Manager Evaluation** section.

To enter comments, click on the **Manager** section and enter your response.

Questions

Enter your answer in the Response box.

Manager	Employee
Response <div> Normal ▼ B I U A ▼ ■ □ ↺ ↻ </div>	Response TEST

Click **Next**.

5. Review the **Summary** of your responses.
6. Select one of the following:
 - a. **Submit**: Complete the evaluation and initiate next step
 - b. **Save for Later**: Keep changes and exit
 - c. **Close**: Exit without saving changes

Manager/Employee Meeting

1. You will receive a task in your **Inbox** to complete the **Manager/Employee Meeting**. **Do not** click **Submit** on this task until you have completed the **Manager/Employee Meeting**.
2. Schedule the Manager/Employee conversation and meet with the employee.

3. Following the meeting, navigate to your **Inbox**.
4. Select the **To Do** task: **Manager/Employee Meeting Required** task.
Confirm you are selecting the task for the correct employee.
5. Click **Submit** to acknowledge that the conversation has occurred. Consider including the date the conversation took place in the comment section.
Note: *Once you submit this step, the employee will be able to view all manager comments on the template.*

The Employee will receive a task in their **Inbox** to acknowledge the conversation and provide additional comments.