Step 4: Set Review Content (Review Staff Member Goals)

Purpose
To review goals entered by the staff member for the current evaluation year and review the competencies on which that staff member will be evaluated.

First Things First

1. Competency Identification and Start Performance Review
Supervisors were sent an e-mail advising how to confirm, modify, or identify the competencies for each of their direct reports. Instructions for Step 1: “Review and Discuss Competencies with Staff Member”, are available on the webpage for Human Resources at the bottom of the FAQ Section. Also available on the web page is a document, “Overview of Core Competencies and Ratings” to refresh your recollection on the competencies and associated behaviors. The Office of Human Resources will complete Step 2: “Start Performance Review” for the staff member. Supervisors and staff members will be notified via e-mail once that step has been completed.

2. Staff Member Enters Goals
For purposes of the performance evaluation, supervisors can only review goals after Step 3: “Set Review Content (Identify Goals)” has been completed by the staff member.
Step 4: Set Review Content (Review Staff Member Goals)

It may not be easily apparent how to access the evaluation for the staff member. There are four ways for you to access the evaluation to review goals for your staff member(s):

- Team Performance icon;
- Performance tab;
- Actions button; or
- Inbox.

How to Access the Evaluation to Enter SMART Goals

**Team Performance Icon**

From the home page, click “Team Performance” in your worklets.

Then click “My Team’s Performance Reviews.”

Identify the staff member whose goals you wish to review and click “Annual Performance Evaluation 2019: Staff Member’s name.”

Click “Open” to access the evaluation instrument.
Step 4: Set Review Content (Review Staff Member Goals)

Performance Tab

The second way to access the evaluation instrument of the staff member is via the performance tab on the staff member’s page.

To access the Performance tab, on the home page, enter the name of the staff member in the search bar and click on the name when it populates to get to the staff member’s page.

Click “Performance” on the lower left side of the menu. If the staff member was evaluated last year, you will see the competencies on which he/she was evaluated, along with the corresponding rating on the screen.

Click “Performance Reviews.”


Click “Open” to access the evaluation instrument.
Step 4: Set Review Content (Review Staff Member Goals)

The third way to access the evaluation instrument is via the Actions button on the staff member’s page.

To access the Actions button, on the home page, enter the name of the staff member in the search bar and click on the name when it populates to get to the staff member’s page.

On the left side of the screen, click the Actions button.

Then scroll to and hover over “Talent” and click “View Employee Reviews.”


Click “Open” to access the evaluation instrument.
Step 4: Set Review Content (Review Staff Member Goals)

The fourth way to access the evaluation instrument is via the Inbox from your home page.

The Inbox should be visible from the home page. Locate the item called "Set Content: Annual Performance Evaluation 2019: Staff Member’s Name" for the staff member you wish to review. If you do not see that item, use one of the other three methods to locate the evaluation instrument.

Whether you access this task via the Performance icon, the Performance tab, the Action button or the Inbox, this is the screen you will see. Click the expand icon to enlarge the screen. Read the supervisor instructions in orange print then scroll down to review the goals of the staff member.
Two Responsibilities in Step 4

As stated in the Purpose on Page 1, the purpose of this step is to review the SMART goals entered by the staff member and verify that the six Furman core competencies and the five elective competencies are correct.

SMART is an acronym for:
- Specific,
- Measurable,
- Action-oriented,
- Relevant, and
- Time-bound.

The goal should be written in this fashion and stated in the description area of each goal listed.

Three (3) to five (5) SMART goals should be listed. Upon review click “Next.”
### Step 4: Set Review Content (Review Staff Member Goals)

#### 2. Review the Competencies

<table>
<thead>
<tr>
<th>Core Competencies</th>
<th>Supervisory Competencies</th>
<th>Job-Specific Competencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Build One Furman</td>
<td>Elective</td>
<td>Elective</td>
</tr>
<tr>
<td>Collaboration</td>
<td>Elective</td>
<td>Elective</td>
</tr>
<tr>
<td>Communication</td>
<td>Elective</td>
<td>Elective</td>
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<tr>
<td>Institutional Values</td>
<td>Elective</td>
<td>Elective</td>
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<tr>
<td>Professional Growth</td>
<td>Elective</td>
<td>Elective</td>
</tr>
<tr>
<td>Service</td>
<td>Elective</td>
<td>Elective</td>
</tr>
</tbody>
</table>

The six Furman core and five supervisory, and/or job-specific core competencies that your staff member and you selected will be listed in alphabetical order. There is nothing to edit in this section. Review the selected competencies by scrolling to the bottom of the screen then click "Next."

Upon clicking “Next,” you will be taken to the summary page. Scroll down to the end of the page.

If you need the staff member to edit the goals, click "Send Back," enter the rationale, and click "Submit." It will route back to the staff member to edit, then route back to the supervisor.

If the competencies are incorrect, click “Close” and send e-mail Human Resources.

If everything is in order click "Submit."

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Continue to Page 8 →
Step 4: Set Review Content (Review Staff Member Goals)

“Skip” “Get Feedback” or “Done”

From this screen, you have three options – click "Skip," click "Get Feedback," or click "Done."
If you click “Skip,” you will be taken to this screen affirming you are skipping getting feedback at this time. Click “OK.”
Both this screen and your Inbox will reflect that you have advanced to the next step in the process: “Step 6: Complete Manager Evaluation.” Click “Done.”

The other two options, “Click ‘Get Feedback’” and “Click ‘Done’” advance you to Step 5: Start Performance Review (with the Option to Get Feedback). Getting feedback will be discussed in the Step 5 instructions.

What Next?
The next steps, Step 5: Start Performance Review (with the Option to Get Feedback) or Skip Feedback, and Step 6: Complete Manager Evaluation for Performance Review, will be completed by you, the supervisor.

Questions?
If you have any questions, please send an e-mail to:

humanresources@furman.edu.