Introduction
Agenda

- Review the Performance Management Process Flow
- Review the Talent Management Settings
- Configure Review Components
- Create a Review Template
- Distribute a Review
- Schedule a Review
Performance Management Overview
Performance Management Overview

- Performance Management helps organizations assess employee performance through the use of a performance review.

- System-delivered elements include review ratings, rating scales, review types, goal types, competency types, and a competency library.

- Human Resources administrators are responsible for the configuration and maintenance of the options available in creating a review, as well as distributing and/or scheduling a review.
Performance Management Process Flow

Review Configuration
1. Add Review Ratings
2. Add Rating Scales
3. Add Review Types
4. Configure Reviews

Goal Management
1. Review Talent Management Settings
2. Add Goal Types
3. Add Corporate Goals
4. Add Goals
5. Assign/Recommend Goals

Competency Management
1. Add Competency Types
2. Add Competencies
3. Assign Competencies

Distribute/Schedule Reviews
Requests > Inbox

Myself > Jobs > Reviews
Review Summary

Annual Performance Review - Chait
Izhar P Chait, Director of HR Employee Observations
Effective Date 11/06/2013

This review form includes an employee self-appraisal, which will then be forwarded to the manager for appraisal. Manager will then schedule a face-to-face meeting with employee to discuss details.

Contributors

| Izhar P Chait | Casi A Winterstein |

Review sections

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<th>Manager Rating</th>
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<td>Competencies</td>
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Send

Send to the next contributor.
Routing Comments
These comments will not appear on the final review and are visible to all review contributors.
Review - Goals

Izhar P Chait - Goals

Please complete this section completely and provide comments for each goal.

Rating Scale: Five Point

View Entire Goal Plan

1. Complete 16 hours of HR-related training
   - 75% complete
   
   Complete a minimum of 16 hours of Human Resources related training for continuing education.
   
   Show details...
   
   Journal Entries

Add your comments

No comments are available

Casi A Winterstein, Manager

No Rating Submitted

2. Complete Company Security Awareness Course
   - 0% complete

Goal Weight: 75%
Review Summary

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Izhar P Chait , Director of HR Employee Observations
Effective Date 11/06/2013

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<td>—</td>
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Send
Send to the next contributor.
Review - Competencies

Izhar P Chait - Competencies

Please complete this section completely and provide comments for each competency.
Rating Scale: 1-5 Points

1. Initiative
   - Spotting opportunities within a circle of influence; anticipating threats and acting on them; self-starting rather than waiting passively until the situation demands action.
   - Show details...

Competency Weight: 100%

Journal Entries

No comments are available.

Casi A Winterstein, Manager
No Rating Submitted

Average Competency Ratings

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<th>Manager Rating</th>
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Izhar P Chait - Developmental Comments

Enter comments outlining development plans, action steps to accomplish them, and desired outcomes. View Personal Development

Employee Comments

During the next review period, I plan to ...
Review – Personal Development Plan

Izhar P Chait - Developmental Comments

Enter comments outlining development plans, action steps to accomplish them, and desired outcomes.

Employee Comments

During the next review period, I plan to...

Personal Development

Chait, Izhar P.
(Director of HR)

0 Plans

Add a Plan

What would you like to accomplish?

Would you like to add more details about the plan?

For this plan, which skills and competencies will you work on?

On the next page, we’ll provide recommendations for courses and training that could help you develop the skills and competencies entered here.

When do you think you can complete this plan?

Example Plans

- Increase my leadership abilities.
- Acquire a challenging management position.
- Improve my communication skills.
Izhar P Chait - Overall Comments

This comment is for any other feedback you wish to provide. It may be further clarification on goals and competencies or it may be something unrelated that you just want to make sure is included.

This comment will be viewable as part of the approved review.

Comment:

I am very pleased with my performance during this review period. I feel I demonstrated ...
**Review Summary**

**Annual Performance Review - Chait**  
*Izhar P Chait*, Director of HR  
**Employee Observations**  
**Effective Date 11/06/2013**

This review form includes an employee self appraisal, which will then be forwarded to the manager for appraisal. Manager will then schedule a face-to-face meeting with employee to discuss details.

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<th><strong>Manager Rating</strong></th>
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<tr>
<td>Goals Complete</td>
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<td>-</td>
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</table>

**Send**

Send to the next contributor.  
Routing Comments
**Send**

Send to the next contributor.

**Routing Comments**

These comments will not appear on the final review and are visible to all review contributors.

I have completed my portion of the performance review and look forward to meeting with you soon.
Review Ratings

Review Configuration
1. Add Review Ratings
2. Add Rating Scales
3. Add Review Types
4. Configure Reviews

Goal Management
1. Review Talent Management Settings
2. Add Goal Types
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Competency Management
1. Add Competency Types
2. Add Competencies
3. Assign Competencies

Distribute/Schedule Reviews
Performance Management allows you to assess an employee's performance using rating scales. Rating scales are composed of various review rating levels.

The following are examples of review rating levels:
- Below Expectations
- Meets Expectations
- Exceeds Expectations
- Needs Improvement
- Outstanding

Performance Management provides several system-delivered review ratings.
Izhar P Chait - Goals

Please complete this section completely and provide comments for each goal.
Rating Scale Five Point
View Entire Goal Plan

1. Complete 16 hours of HR-related training
   0% complete
   Complete a minimum of 16 hours of Human Resources related training for continuing education.
   Show details...
   Journal Entries

I completed 24 hours of training.

Izhar P Chait, Employee
5 - Exceptional
1. Did Not Meet Expectations
2. Below Expectations
3. Met Expectations
4. Exceeds Expectations
5. Exceptional

Section Weight 75%
# Review Ratings

## System Configuration > Business Rules > Review Ratings

### Review Ratings Table

<table>
<thead>
<tr>
<th>Code</th>
<th>Title</th>
<th>Description</th>
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<tbody>
<tr>
<td>BELOW</td>
<td>Below Expectations</td>
<td>The objective was not met. While a reasonable effort was made to achieve the objective, the results were less than the stated objectives.</td>
</tr>
<tr>
<td>DIDNOT</td>
<td>Did Not Meet Expectations</td>
<td>The objective was not met. Insufficient effort was made toward accomplishing the objective.</td>
</tr>
<tr>
<td>EXCEED</td>
<td>Exceeds Expectations</td>
<td>The objective was met. Stated objectives were achieved in a manner that exceeded the plan. Contribution to the organization’s objectives was positive.</td>
</tr>
<tr>
<td>EXCELL</td>
<td>Excellent</td>
<td>Excellent</td>
</tr>
<tr>
<td>EXCEPT</td>
<td>Exceptional</td>
<td>The objective was met. Stated objectives were far surpassed with a significant contribution to the organization’s objectives.</td>
</tr>
<tr>
<td>MEETS</td>
<td>Meets Job Requirements</td>
<td>Meets Job Requirements</td>
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<tr>
<td>MET</td>
<td>Met Expectations</td>
<td>The objective was met. Stated objectives were achieved at the specified levels.</td>
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<td>NEEDS</td>
<td>Needs Improvement</td>
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<tr>
<td>SAT</td>
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Records per page: 10
Add a Review Rating

Add/Change Review Ratings

- Code: BELOW
- Title: Below Expectations
- Description: The objective was not met. While a reasonable effort was made to achieve the objective, the results were less than the stated objectives.
Rating Scales

Review Configuration
1. Add Review Ratings
2. **Add Rating Scales**
3. Add Review Types
4. Configure Reviews

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1. Review Talent Management Settings
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Distribute/Schedule Reviews
Rating Scales

- Rating scales are used in assessing employee goals and/or competencies during the performance review process. Rating scales must be configured before they can be applied to a review template.

- Performance Management provides the following two system-delivered rating scales: Three Point and Five Point. Human Resources Administrators can add user-defined rating scales.

- Review rating maximum and minimum ranges can be established to accurately calculate rating ranges for an employee's performance review.
Review – Rating Scales

Izhar P Chait - Goals

Please complete this section completely and provide comments for each goal.

Rating Scale: Five Point

Section Weight: 75%

1. Complete 16 hours of HR-related training
   Goal Weight: 75%
   0% complete

Complete a minimum of 16 hours of Human Resources related training for continuing education.
Show details...

I completed 24 hours of training.
Demonstration
Add a Rating Scale
Add a Rating Scale

<table>
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<td>Review Templates</td>
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# Add a Rating Scale

## Rating Scales

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<tr>
<td><strong>Five Point</strong></td>
<td>The rating scale for this section is 1 through 5.</td>
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<tr>
<td><strong>One Point</strong></td>
<td>To be used for Employee Acknowledgements, for an employee to acknowledge they understand new policy or procedure.</td>
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<tr>
<td><strong>Three Point</strong></td>
<td>The rating scale for this section is 1 through 3.</td>
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Add a Rating Scale

Add/Change Rating Scale

Title

* Four Point

Description

* Rating scale describing four levels of performance.

Review Ratings

Add review rating levels and assign a review rating to each level.

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Talent Management Settings

Change Talent Management Settings

Job-based Competencies

Minimum Proficiency Level Rating Scale

The rating scale for this section is 1 through 5.
Demonstration
Update Talent Management Settings
Talent Management Settings - Configuration

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Talent Management Settings - Configuration

Talent Management Settings

Configure Settings for various parts of Talent Management for this company.

**Talent Card**
Choose information to display on the Talent Card. Employee Compare page (if Succession Plans are enabled).

Talent Factors:
- Critical Individual
- Potential
- Performance Level
- Promotability
- Talent Pool
- Retention Risk

Employee Information:
- Supervisor
- Location
- Current Compensation
- Phone Number
- E-mail address

Predictive Analytics:
- Retention Score *
- High Performer *

* If checked, these will also display on the employee Talent Factors page and the Employee Summary page.

Predictive Analytics
Configure settings to calculate predictive analytics for reporting on employee retention scores (Predictive Retention Score Report) and high performers (High Performer Employee Listing). Predictive analytics information can be displayed on talent pages, including the Talent Card, Employee Compare, and Talent Factors pages, by selecting the Talent Card display.

Retention Score
Indicates the likelihood an employee will stay with the company in the next 12 months based on an algorithm consisting of demographics, benefits, job history, compensation, previous employment, and education data. A low retention score indicates a low probability the employee will stay; a high retention score indicates a high probability the employee will stay.

Display a warning when an employee's score is less than or equal to 25.0 %
Talent Management Settings - Configuration

Job-based Competencies
- Minimum Proficiency Level
- Rating Scale: Three Point
- The rating scale for this section is 1 through 3.

Performance Management
- Goals
  - Choose information to be included with goals
    - Type
    - Stretch Goal
    - Organizational Impact
    - Corporate Goal Alignment
    - Weight
    - Goal Progress

- Choose which categories of goals are included on an employee's review
  - Developmental goals
  - Performance goals
  - Personal goals

Date Options
- Require goal Start Date and Due Date

Reviews
- Enable additional contributor feedback
- Enable routing comments on Reviews
Talent Management Settings - Configuration
Goal Types

- Goal types are broad categories that group similar goals.
- Goal types must be configured before goals can be associated with them.
- Performance Management provides the following four goal types: Customer, Financial, Internal Business Processes, and Learning and Growth.
## Talent Management > Configuration > Goal Type

### Goal Type

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer</td>
<td>Customer</td>
</tr>
<tr>
<td>Financial</td>
<td>Financial</td>
</tr>
<tr>
<td>Internal Business Processes</td>
<td>Internal Business Processes</td>
</tr>
<tr>
<td>Learning and Growth</td>
<td>Learning and Growth</td>
</tr>
<tr>
<td>Unspecified</td>
<td>Unspecified goal type is used internally when goal types are turned off in the talent settings. It cannot be modified or deleted.</td>
</tr>
</tbody>
</table>
Add a Goal Type

Add/Change Goal Type

<table>
<thead>
<tr>
<th>Title</th>
<th>Sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Sales</td>
</tr>
</tbody>
</table>
Goal Type Alignment

1. Complete 16 hours of HR-related training
   75% complete
   Complete a minimum of 16 hours of Human Resources related training for continuing education.
   Hide details
   Category: Developmental
   Type: Learning and Growth
   Alignment: Continuing Education

Add/Change Corporate Goal

Add/Change Recommended Goals

Add/Change Assignable Goals
Corporate Goals

Review Configuration
1. Add Review Ratings
2. Add Rating Scales
3. Add Review Types
4. Configure Reviews

Goal Management
1. Review Talent Management Settings
2. Add Goal Types
3. Add Corporate Goals
4. Add Goals
5. Assign/Recommend Goals

Competency Management
1. Add Competency Types
2. Add Competencies
3. Assign Competencies

Distribute/Schedule Reviews
Corporate Goals

- Corporate goals direct employees in accomplishing specific tasks within a given time frame toward an organization's desired results.

- When configuration is complete, corporate goals can be aligned with individual employee goals and goals the administrator or manager may have assigned to the employee.

- Corporate goals are unique for each company; therefore, they must be established by you, the customer, and are not provided by Performance Management.
Corporate Goal Alignment

1. Complete 16 hours of HR-related training
   - 75% complete
   - Complete a minimum of 16 hours of Human Resources related training for continuing education.
   - Category: Developmental
   - Type: Learning and Growth
   - Alignment: Continuing Education

Add/Change Recommended Goals

- Goal Type: Learning and Growth
  - Corporate Goal Alignment: Customer Experience
  - Organizational Impact: Medium
  - This is a Stretch Goal

Add/Change Assignable Goals

- Goal Type: Learning and Growth
  - Corporate Goal Alignment: Customer Experience
  - Organizational Impact: Medium
  - This is a Stretch Goal
Demonstration
Add a Corporate Goal
Add Corporate Goals

In UltiPro, within the Configuration section, you can define or modify Corporate Goals under the 'Corporate Goals' category. This is done under the Talent Management tab, specifically under the Succession Management section.

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Competencies</td>
<td>Define or modify Competencies</td>
</tr>
<tr>
<td>Competency Types</td>
<td>Define or modify Competency Types</td>
</tr>
<tr>
<td>Corporate Goals</td>
<td>Define or modify Corporate Goals</td>
</tr>
<tr>
<td>Goal Types</td>
<td>Define or modify Goal Types</td>
</tr>
<tr>
<td>Rating Scales</td>
<td>Define or modify Rating Scales</td>
</tr>
<tr>
<td>Review Templates</td>
<td>Define or modify Review Templates</td>
</tr>
</tbody>
</table>
Talent Management > Configuration > Corporate Goals

Add Corporate Goals

---

### Corporate Goals

**Find by:**
- **Status:** is Active

**Filtered by:** Status - is Active

---

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
<th>Type</th>
<th>Status</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cell Phone Policy Acknowledgement</td>
<td>An employee who uses a company-supplied device or a company-supplied vehicle is prohibited from using</td>
<td>Internal Business Processes</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>Continuing Education</td>
<td>Attain and document at least 25 hours of continuing education annually as defined by department policy.</td>
<td>Learning and Growth</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>Customer Experience</td>
<td>Propel the Customer Experience from process to practice.</td>
<td>Customer</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>Customer Retention</td>
<td>Maintain 97% customer retention.</td>
<td>Customer</td>
<td>Active</td>
<td></td>
</tr>
</tbody>
</table>
Add a Corporate Goal

Talent Management > Configuration > Corporate Goals > Add
Recommended and Assignable Goals

Review Configuration
1. Add Review Ratings
2. Add Rating Scales
3. Add Review Types
4. Configure Reviews

Goal Management
1. Add Review Ratings
2. Add Rating Scales
3. Add Review Types
4. Add Goals
5. Assign/Recommend Goals

Competency Management
1. Add Competency Types
2. Add Competencies
3. Assign Competencies

Distribute/Schedule Reviews
Recommended vs Assignable Goals

PULL

Recommended
Employee driven

Editable Assignable

Goal setting process

Non-editable Assignable
Manager driven

PUSH
Recommended Goals

Recommended goals are goals developed by a Human Resources administrator or Manager and are recommended to an employee or group of employees to adopt.

During configuration, recommended goals can be:
- Aligned with corporate goals
- Identified as a stretch goal
- Assigned a goal weight

Once defined, these goals are then recommended for individual employees, all employees, or groups of employees by selecting qualifiers.
**Recommended Goals**

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
<th>Alignment</th>
<th>Type</th>
<th>Weight</th>
<th>Goal Progress</th>
<th>Status</th>
<th>Created By</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete 16 hours of HR-related training</td>
<td>Complete a minimum of 16 hours of Human Resources related training for continuing education.</td>
<td>Continuing Education</td>
<td>Learning and Growth</td>
<td>75%</td>
<td>75% complete</td>
<td>Active</td>
<td>Chait, Izhar P</td>
<td></td>
</tr>
<tr>
<td>Complete Company Security Awareness Course</td>
<td></td>
<td>n/a</td>
<td>Internal Business Processes</td>
<td>0%</td>
<td>0% complete</td>
<td>Active</td>
<td>Chait, Izhar P</td>
<td></td>
</tr>
</tbody>
</table>

**Recommended Goals**

<table>
<thead>
<tr>
<th>Find by</th>
<th>Status</th>
<th>Active</th>
<th>Search</th>
</tr>
</thead>
<tbody>
<tr>
<td>Filtered by</td>
<td>Status - is Active</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Displaying all records

- Complete Presentation Skills Training
  - Complete a training course to enhance your presentation skills.
  - Created By: Chait, Izhar P
  - Status: Active
Recommended Goals

View Recommended Goal

<table>
<thead>
<tr>
<th>Goal Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Title</strong></td>
</tr>
<tr>
<td><strong>Description</strong></td>
</tr>
<tr>
<td><strong>Category</strong></td>
</tr>
<tr>
<td><strong>Weight</strong></td>
</tr>
</tbody>
</table>

Add/Change Goals

<table>
<thead>
<tr>
<th>Goal Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Title</strong></td>
</tr>
<tr>
<td><strong>Description</strong></td>
</tr>
<tr>
<td><strong>Category</strong></td>
</tr>
<tr>
<td><strong>Weight</strong></td>
</tr>
</tbody>
</table>
Demonstration
Add and Assign a Recommended Goal
Add and Assign a Recommended Goal
Add and Assign a Recommended Goal

Recommended Goals

Create and edit goals that you want to make available to others as recommendation.

Find by Status is Active

Filtered by Status - is Active

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
<th>Created By</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>No records found</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Add/Change Recommended Goals

Goal Details

- Title: Complete Presentation Skills Training
- Description: Complicate a training course to enhance your presentation skills.
- Category: Developmental
- Weight: 0%

Goal Type: Learning and Growth
Corporate Goal Alignment: Continuing Education
Organizational Impact: Low

Active
Inactive

Save
Reset
Cancel
Print
Help

UltiPro
Requests Myself My Company Employee Admin Reporting Transfer Data Talent Management Compensation Management Learning Center
Career Development Performance Management Succession Management
Review Templates Distributed Reviews Review SchedulesAssignable Goals Recommended Goals Competencies Configuration

55
Add and Assign a Recommended Goal

Goal Dates
- Start: MM/DD/YYYY
- Due: MM/DD/YYYY

Recommended Options
- Use qualifiers to select employees
- Select specific employees
- All employees

Qualifier | Value
--- | ---
Department | Sales & Marketing
Assignable Goals

- Assignable Goals are goals that can be assigned to an individual employee or a group of employees.

- These goals are a manager’s desired end result for his/her team and are usually established upfront to direct employees in accomplishing specific tasks within a given time frame.

- These goals can be aligned with corporate goals and can be designated as editable, if desired.

- Once the goals are assigned to an employee, the goal becomes part of the employee's assigned goal plan on the employee's Goals page.
Demonstration
Add an Assignable Goal
Add Assignable Goals
# Add Assignable Goals

Create, edit and assign goals for employees on your team.

**Role**

- Performance Administrator

**Assignable Goals**

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
<th>Assignments</th>
<th>Editable</th>
<th>Status</th>
<th>Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Handbook Acknowledgement</td>
<td>I have received my copy of the company's employee handbook. I understand and agree that it is my responsibility</td>
<td>0 Employee</td>
<td>No</td>
<td>Active</td>
<td>Baja, Heidi M.</td>
</tr>
<tr>
<td>Project Management</td>
<td>Deliver projects on time, on vision and within budget.</td>
<td>2 Employee</td>
<td>Yes</td>
<td>Active</td>
<td>Baja, Heidi M.</td>
</tr>
<tr>
<td>Prepare Daily Status Calls</td>
<td>The Administrative Assistant must send proper notification to all Manager's with details for the</td>
<td>7 Employee</td>
<td>No</td>
<td>Active</td>
<td>Baker, Jonathan K</td>
</tr>
</tbody>
</table>
Add Assignable Goals

Add/Change Assignable Goals

Goal Details

- **Title**: Increase Quarterly Sales by 10%
- **Description**: Increase Quarterly Sales by 10%
- **Category**: Performance
- **Weight**: 0%

- **Goal Type**: Financial
- **Corporate Goal Alignment**: 
- **Organizational Impact**: High
- **This is a Stretch Goal**: ?

Status: 
- Active
- Inactive
Add Assignable Goals

Goal Dates

<table>
<thead>
<tr>
<th>Start</th>
<th>MM/DD/YYYY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due</td>
<td>MM/DD/YYYY</td>
</tr>
</tbody>
</table>

Editable by Employees

Choose if employees can edit this goal when it is assigned to them.

- **No** - employees cannot edit
  I want employees to have this specific goal. Changes I make to this goal will be reflected in the goal assigned to each of my employees.

- **Yes** - employees can edit
  I want to use this goal as a starting point for my employees, but it may be edited for each employee's specific needs. Changes I make to this goal will not update the goal for each of my employees.
## Assignable Goals

### Performance Administrator

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
<th>Assignments</th>
<th>Editable</th>
<th>Status</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Handbook Acknowledgement</td>
<td>I have received my copy of the company's employee handbook. I understand and agree that it is my responsibility.</td>
<td>0 Employee(s)</td>
<td>No</td>
<td>Active</td>
<td>Baja, Heidi M.</td>
</tr>
<tr>
<td>Project Management</td>
<td>Deliver projects on time, on vision and within budget.</td>
<td>2 Employee(s)</td>
<td>Yes</td>
<td>Active</td>
<td>Baja, Heidi M.</td>
</tr>
<tr>
<td>Prepare Daily Status Calls</td>
<td>The Administrative Assistant must send proper notification to all Manager’s with details for the Vice.</td>
<td>7 Employee(s)</td>
<td>No</td>
<td>Active</td>
<td>Baker, Jonathan K.</td>
</tr>
<tr>
<td>Complete Company Security Awareness Course</td>
<td>Complete Company Security Awareness Course</td>
<td>249 Employee(s)</td>
<td>No</td>
<td>Active</td>
<td>Parker, Timothy P.</td>
</tr>
<tr>
<td>Increase Quarterly Sales by 10%</td>
<td>Increase Quarterly Sales by 10%</td>
<td>0 Employee(s)</td>
<td>No</td>
<td>Active</td>
<td>Annis, Khloe P.</td>
</tr>
</tbody>
</table>
Assign an Assignable Goals
Assign an Assignable Goals

<table>
<thead>
<tr>
<th>Name</th>
<th>Phone</th>
<th>Status</th>
<th>Role</th>
<th>First Name</th>
<th>Last Name</th>
<th>Company</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baumez, Nourman A.</td>
<td>194959155</td>
<td>Active</td>
<td>Vice President</td>
<td>Heidi</td>
<td>Company</td>
<td></td>
</tr>
<tr>
<td>Belsches, Davis-Weems A.</td>
<td>492581510</td>
<td>Active</td>
<td>Vice President</td>
<td>Heidi</td>
<td>ABC</td>
<td></td>
</tr>
<tr>
<td>Bottner, Rose-Ellen A.</td>
<td>539664626</td>
<td>Active</td>
<td>Vice President</td>
<td>Heidi</td>
<td>Company</td>
<td></td>
</tr>
<tr>
<td>Branscum, Fontaine A.</td>
<td>682286471</td>
<td>Active</td>
<td>Vice President</td>
<td>Heidi</td>
<td>ABC</td>
<td></td>
</tr>
<tr>
<td>Citron, Rogelio C A.</td>
<td>955222692</td>
<td>Active</td>
<td>Vice President</td>
<td>Heidi</td>
<td>Company</td>
<td></td>
</tr>
<tr>
<td>Costigan, Tenika A.</td>
<td>359373667</td>
<td>Active</td>
<td>Vice President</td>
<td>Heidi</td>
<td>ABC</td>
<td></td>
</tr>
<tr>
<td>Cretel, Lashea A.</td>
<td>981505219</td>
<td>Active</td>
<td>Vice President</td>
<td>Heidi</td>
<td>Company</td>
<td></td>
</tr>
<tr>
<td>Donelan, Jilyan A.</td>
<td>802665291</td>
<td>Active</td>
<td>Vice President</td>
<td>Heidi</td>
<td>ABC</td>
<td></td>
</tr>
</tbody>
</table>
Assign an Assignable Goals

Assign Goals

Selected Goals
- Increase Quarterly Sales by 10%

Selected Employees

<table>
<thead>
<tr>
<th>Name</th>
<th>Employee Number</th>
<th>Status</th>
<th>Job Title</th>
<th>Supervisor</th>
<th>Company</th>
<th>Location</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>Albrecht, Taunya A</td>
<td>582725144</td>
<td>Active</td>
<td>Vice President Operations</td>
<td>Haleman, Heidi</td>
<td>ABC Company</td>
<td>Ft. Lauderdale, FL</td>
<td>Remove</td>
</tr>
<tr>
<td>Allshouse, Chantave A</td>
<td>504876656</td>
<td>Active</td>
<td>Vice President Operations</td>
<td>Haleman, Heidi</td>
<td>ABC Company</td>
<td>Atlanta, GA</td>
<td>Remove</td>
</tr>
<tr>
<td>Baumez, Nourman A</td>
<td>194959155</td>
<td>Active</td>
<td>Vice President Operations</td>
<td>Haleman, Heidi</td>
<td>ABC Company</td>
<td>Ft. Lauderdale, FL</td>
<td>Remove</td>
</tr>
<tr>
<td>Belsches, Davis-Weems A</td>
<td>492581510</td>
<td>Active</td>
<td>Vice President Operations</td>
<td>Haleman, Heidi</td>
<td>ABC Company</td>
<td>Ft. Lauderdale, FL</td>
<td>Remove</td>
</tr>
<tr>
<td>Bottner, Rose-Ellen A</td>
<td>539664626</td>
<td>Active</td>
<td>Vice President Operations</td>
<td>Haleman, Heidi</td>
<td>ABC Company</td>
<td>Ft. Lauderdale, FL</td>
<td>Remove</td>
</tr>
</tbody>
</table>
# Assign an Assignable Goals

## UltiPro

<table>
<thead>
<tr>
<th>Requests</th>
<th>Myself</th>
<th>My Company</th>
<th>Employee Admin</th>
<th>Reporting</th>
<th>Transfer Data</th>
<th>Talent Management</th>
<th>Compensation Management</th>
<th>Learning Center</th>
</tr>
</thead>
<tbody>
<tr>
<td>Career Development</td>
<td>Performance Management</td>
<td>Succession Management</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review Templates</td>
<td>Distributed Reviews</td>
<td>Review Schedules</td>
<td>Assignable Goals</td>
<td>Recommended Goals</td>
<td>Competencies</td>
<td>Configuration</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Assignable Goals

### Performance Administrator

**Find by** Status is Active

**Filtered by** Status - is Active

### Displaying all records

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
<th>Assignments</th>
<th>Editable</th>
<th>Status</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Handbook Acknowledgement</td>
<td>I have received my copy of the company's employee handbook. I understand and agree that it is my responsibility</td>
<td>0 Employee(s)</td>
<td>No</td>
<td>Active</td>
<td>Baja, Heidi M.</td>
</tr>
<tr>
<td>Project Management</td>
<td>Deliver projects on time, on vision and within budget.</td>
<td>2 Employee(s)</td>
<td>Yes</td>
<td>Active</td>
<td>Baja, Heidi M.</td>
</tr>
<tr>
<td>Prepare Daily Status Calls</td>
<td>The Administrative Assistant must send proper notification to all Manager's with details for the Vice</td>
<td>7 Employee(s)</td>
<td>No</td>
<td>Active</td>
<td>Baker, Jonathan K.</td>
</tr>
<tr>
<td>Complete Company Security Awareness Course</td>
<td>Complete Company Security Awareness Course</td>
<td>249 Employees(s)</td>
<td>No</td>
<td>Active</td>
<td>Parker, Timothy P.</td>
</tr>
<tr>
<td>Increase Quarterly Sales by 10%</td>
<td>Increase Quarterly Sales by 10%</td>
<td>10 Employee(s)</td>
<td>No</td>
<td>Active</td>
<td>Annis, Khloe P.</td>
</tr>
</tbody>
</table>
Competency Types

Review Configuration
1. Add Review Ratings
2. Add Rating Scales
3. Add Review Types
4. Configure Reviews

Goal Management
1. Review Talent Management Settings
2. Add Goal Types
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Competency Management
1. Add Competency Types
2. Add Competencies
3. Assign Competencies

Distribute/Schedule Reviews
A competency is a term used to describe a behavior that demonstrates sufficient skill, knowledge, or experience when performing a job successfully.

Competency types are broad categories used to group together similar competencies.

Competency types must be configured before competencies can be associated with them.

Performance Management provides the following five system-delivered competency types: Business and Organization, Company, Functional, Interpersonal, and Intrapersonal.
Review – Competency Types

Izhar P Chait - Competencies

1. **Initiative**

   Spotting opportunities within a circle of influence; anticipating threats and acting on them; self-starting rather than waiting passively until the situation demands action.

   **Type**  
   Intrapersonal

   **Add your comments**
<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business and Organization</td>
<td>Business and Organization</td>
</tr>
<tr>
<td>Company</td>
<td>Company</td>
</tr>
<tr>
<td>Functional</td>
<td>Functional</td>
</tr>
<tr>
<td>Interpersonal</td>
<td>Interpersonal</td>
</tr>
<tr>
<td>Intrapersonal</td>
<td>Intrapersonal</td>
</tr>
</tbody>
</table>
Add/Change Competency Type

Title: Sales

Description: Sales
Add and Assign Competencies

Review Configuration
1. Add Review Ratings
2. Add Rating Scales
3. Add Review Types
4. Configure Reviews

Goal Management
1. Review Talent Management Settings
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Competency Management
1. Add Competency Types
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3. Assign Competencies

Distribute/Schedule Reviews
Competencies

- Competency is a term used to describe a behavior that demonstrates sufficient skill, knowledge, or experience when performing a job successfully.

- Human Resources administrators define competencies on the Competencies page.

- Performance Management is delivered with a competency library, which includes approximately 38 competencies.
Demonstration
Add and Assign a Competency
Add and Assign Competencies
Select one or more competencies and click "assign" in the toolbar to assign competencies. To view details, click on the competency title. To see a listing of assigned employees and to manage that list, click the assigned link.

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
<th>Type</th>
<th>Assignments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accountability</td>
<td>Accepting responsibility that results in anticipation/prevention of problem areas from actions, and _</td>
<td>Intrapersonal</td>
<td>Assignments</td>
</tr>
<tr>
<td>Achievement</td>
<td>Being persistent and showing perseverance on achieving concrete and tangible results out of personal _</td>
<td>Intrapersonal</td>
<td>No assignments</td>
</tr>
<tr>
<td>Orientation</td>
<td>Maintaining effectiveness in reaching set goals by adapting to changed circumstances, tasks, responses _</td>
<td>Intrapersonal</td>
<td>Assignments</td>
</tr>
<tr>
<td>Adaptability</td>
<td>Taking responsibility for a thorough and detailed method of working.</td>
<td>Functional</td>
<td>Assignments</td>
</tr>
<tr>
<td>Computer Literacy</td>
<td>Using computers effectively and efficiently in the working environment.</td>
<td>Functional</td>
<td>Assignments</td>
</tr>
</tbody>
</table>
Add and Assign Competencies

Add/Change Competency

Type: Business and Organization

Title: Account Management

Description:

Ability to effectively manage the day to day support of a particular customer’s account.
### Add and Assign Competencies

Select one or more competencies and click "assign" in the toolbar to assign competencies. To view details, click on the competency title. To see a listing of assigned employees and to manage that list, click the assigned link.

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
<th>Type</th>
<th>Assignments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Management</td>
<td>Ability to effectively manage the day to day support of a particular customer’s account.</td>
<td>Business and Organization</td>
<td>No assignments</td>
</tr>
<tr>
<td>Accountability</td>
<td>Accepting responsibility that results in anticipation/prevention of problem areas from actions, and ...</td>
<td>Intrapersonal</td>
<td>Assignments</td>
</tr>
<tr>
<td>Achievement Orientation</td>
<td>Being persistent and showing perseverance on achieving concrete and tangible results out of personal ...</td>
<td>Intrapersonal</td>
<td>No assignments</td>
</tr>
<tr>
<td>Adaptability</td>
<td>Maintaining effectiveness in reaching set goals by adapting to changed circumstances, tasks, respons ...</td>
<td>Intrapersonal</td>
<td>Assignments</td>
</tr>
<tr>
<td>Attention to Detail</td>
<td>Taking responsibility for a thorough and detailed method of working.</td>
<td>Functional</td>
<td>Assignments</td>
</tr>
<tr>
<td>Computer Literacy</td>
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<td>Assignments</td>
</tr>
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</table>
Add and Assign Competencies

Assign Employees to Selected Competencies

Choose the employees you want to assign to your selected competencies. Click "save" in the toolbar when you are finished.

Selected Competencies
Account Management

Role
Performance Administrator

Find by
Department is Customer Service

Displaying 1-10 of 41 records

<table>
<thead>
<tr>
<th>41 Record(s) selected</th>
<th>Select all 41</th>
<th>Deselect all</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Employee Number</td>
<td>Employee Status</td>
</tr>
<tr>
<td>Awkward, Latanya M.</td>
<td>318150923</td>
<td>Active</td>
</tr>
<tr>
<td>Baker, Jonathan K.</td>
<td>762532453</td>
<td>Active</td>
</tr>
<tr>
<td>Baren, Mark M.</td>
<td>000000009</td>
<td>Active</td>
</tr>
</tbody>
</table>
Add and Assign Competencies

Information
- One competency was assigned to 41 employees.

Select one or more competencies and click "assign" in the toolbar to assign competencies. To view details, click on the competency title. To see a listing of assigned employees and to manage that list, click the assigned link.

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<tr>
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</thead>
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Review Types

Review Configuration
1. Add Review Ratings
2. Add Rating Scales
3. Add Review Types
4. Configure Reviews

Goal Management
1. Review Talent Management Settings
2. Add Goal Types
3. Add Corporate Goals
4. Add Goals
5. Assign/Recommend Goals

Competency Management
1. Add Competency Types
2. Add Competencies
3. Assign Competencies

Distribute/Schedule Reviews
Review Types

- A review is a method by which the job performance of an employee is evaluated.

- Review types are broad categories that group similar reviews.

- Review types must be set up before reviews can be associated with them.

- Performance Management is delivered with four review types.
Add/Change Review Template
Mr. Izhair P. Chait - 131891137 - ABC Company(ENT)

Template Details

Review Type
- Annual Review
  - Adhoc Review
  - Annual Review
  - Disciplinary Review
  - Disciplinary Review
  - Performance
  - Policy Acknowledgement

Review Sections Details

Summary

Review Sections

Complete information for managing and finding this template.

- Code: ANN2015
- Title: 2015 Annual Performance Review
- Description: Annual Review Form
- Review type: Annual Review
- Template Status: Active

Choose at least one section that will display on this review

- Goals
- Competencies
### Review Types

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Review category</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACKNOW</td>
<td>Policy Acknowledgement</td>
<td>Performance (P)</td>
</tr>
<tr>
<td>DISC</td>
<td>Disciplinary Review</td>
<td>Performance (P)</td>
</tr>
<tr>
<td>PERF</td>
<td>Performance</td>
<td>Performance (P)</td>
</tr>
<tr>
<td>sADHO</td>
<td>Adhoc Review</td>
<td>Performance (P)</td>
</tr>
<tr>
<td>SAL</td>
<td>Salary</td>
<td>Salary (S)</td>
</tr>
<tr>
<td>sANNU</td>
<td>Annual Review</td>
<td>Performance (P)</td>
</tr>
<tr>
<td>sDSCPR</td>
<td>Disciplinary Review</td>
<td>Performance (P)</td>
</tr>
</tbody>
</table>

Displaying 1-7 of 7 records
# Add a Review Type

## Review Types

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Review category</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACKNOW</td>
<td>Policy Acknowledgement</td>
<td>Performance (P)</td>
</tr>
<tr>
<td>DISC</td>
<td>Disciplinary Review</td>
<td>Performance (P)</td>
</tr>
<tr>
<td>PERF</td>
<td>Performance</td>
<td>Performance (P)</td>
</tr>
<tr>
<td>sADHOr</td>
<td></td>
<td>Performance (P)</td>
</tr>
<tr>
<td>SAL</td>
<td></td>
<td>Performance (P)</td>
</tr>
<tr>
<td>sANNUr</td>
<td></td>
<td>Performance (P)</td>
</tr>
<tr>
<td>sDSCPr</td>
<td></td>
<td>Performance (P)</td>
</tr>
</tbody>
</table>

### Add Record

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>3MONTH</td>
</tr>
<tr>
<td></td>
<td>3-Month New Hire</td>
</tr>
<tr>
<td></td>
<td>English (USA)</td>
</tr>
<tr>
<td></td>
<td>English (CAN)</td>
</tr>
<tr>
<td></td>
<td>English (GBR)</td>
</tr>
<tr>
<td></td>
<td>Spanish (USA)</td>
</tr>
<tr>
<td></td>
<td>French (CAN)</td>
</tr>
<tr>
<td></td>
<td>Portuguese (BRA)</td>
</tr>
<tr>
<td></td>
<td>Dutch (NLD)</td>
</tr>
<tr>
<td></td>
<td>German (DEU)</td>
</tr>
</tbody>
</table>

**Displaying 1-7 of 7 records**

**Add** | **Delete**
Review Templates

Review Configuration
1. Add Review Ratings
2. Add Rating Scales
3. Add Review Types
4. Configure Reviews

Goal Management
1. Review Talent Management Settings
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Competency Management
1. Add Competency Types
2. Add Competencies
3. Assign Competencies

Distribute/Schedule Reviews
Review Templates

- Review templates contain general information, review sections, scoring and rating scales, and contributors for a review.

- Human Resources administrators create review templates based on the needs of your organization.

- Active templates can be distributed to employees.
Demonstration
Add a Review Template
Add a Review Template
Add a Review Template

Review Templates

Find by Title starts with Search

Actions Add

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
<th>Type</th>
<th>Status</th>
<th>Created</th>
<th>Last Modified</th>
</tr>
</thead>
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<td>Active</td>
<td>06/01/2010</td>
<td>11/08/2012</td>
</tr>
<tr>
<td>Midyear Review</td>
<td>Midyear Review</td>
<td>Annual Review</td>
<td>Active</td>
<td>07/08/2010</td>
<td>07/08/2010</td>
</tr>
<tr>
<td>Probationary Review</td>
<td>Probationary review for all employees</td>
<td>Disciplinary Review</td>
<td>Active</td>
<td>04/17/2014</td>
<td>04/17/2014</td>
</tr>
</tbody>
</table>
Add a Review Template

Add/Change Review Template
Mr. Khloe P. Arris - 487120761 - ABC Company

Template Details

General Information
Complete information for managing and finding this template.

- Code: SALESmgr
- Title: Sales Manager Annual Review
- Description: Annual Performance Review template for Sales Managers
- Review type: Annual Review

Review Sections
Choose at least one section that will display on this review.
- Goals
- Competencies
- Developmental Comments

Scoring
Use different rating scales for scored sections and the final score. Manager will need to choose a final score on the review.
- Use section weights

<table>
<thead>
<tr>
<th>Scorer Sections</th>
<th>Rating Scale</th>
<th>Section Weight</th>
</tr>
</thead>
<tbody>
<tr>
<td>Final score</td>
<td>Three Point</td>
<td></td>
</tr>
<tr>
<td>Goals</td>
<td>Three Point</td>
<td>75%</td>
</tr>
<tr>
<td>Competencies</td>
<td>Three Point</td>
<td>25%</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>100%</td>
</tr>
</tbody>
</table>

UltiPro
Ultimate Software
Add a Review Template

Template Details

Rating Scale Display Options
Determine how the rating scale is displayed.
- Display both numerical rating and rating name
- Display numerical rating only
- Display rating name only
- Display numerical rating as stars

Use advanced options

Contributors
Choose contributors and the order in which they will contribute to this review.

Contributor Paths
- Employee > Manager
- Manager > Employee
- Manager Only

Contributor Options
Include manager II or an administrator role to contribute to the review.
- Include Manager II
- Include an Administrator Role

Additional Contributor Feedback
Enable additional contributor feedback, choose whether employees can see it and weight the amount additional contributors will affect the score of the review.
- Use additional contributor feedback
  - Allow employees to see additional contributor feedback
Add/Change Review Template
Mr. Khloe P. Annis - 487120761 - ABC Company

Review Sections Details

General Instructions
Enter instructional text to display at the top of the review.
Instructions: Please complete all sections of this review form.

Compliance Statement
Display compliance statement
The following statement will appear at the beginning of the Sign & Complete section on an employee's performance review.

ATTENTION!
If an employee disagrees with any of the information contained in this document, he or she can submit a written statement explaining his or her position, which will be maintained as part of his or her employee personnel file.
Add a Review Template

Goals

Enter instructional text to display on the Goals page and choose additional information to display with the goals.

Instructions

Please enter your goal ratings

Displayed Details

Title
Description
Ratings and Comments
Goal Category
Goal Type

Additional Details

☑ Employee Rating
☐ Required
☐ Optional
☐ Corporate Goal Alignment
☐ Start date
☐ Due date
Add a Review Template

Enter instructional text to display on the Competencies page and choose additional information to display with competencies.

Instructions

- Please enter your competency ratings

Displayed Details

- Title
- Description
- Ratings and Comments

Additional Details

- Employee Rating
  - Required
  - Optional

Competencies To Include

- Employee Assigned
- Job-based
  - Display Minimum Proficiency Level
- Template-based
  - Enable Weighting
Add a Review Template

Add/Change Review Template
Mr. Khloe P. Arris - 487120761 - ABC Company

Summary

Request Information

Template Details

<table>
<thead>
<tr>
<th>Before</th>
<th>Submitted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code</td>
<td>SALES MGR</td>
</tr>
<tr>
<td>Title</td>
<td>Sales Manager Annual Review</td>
</tr>
<tr>
<td>Description</td>
<td>Annual Performance Review template for Sales Managers</td>
</tr>
<tr>
<td>Review type</td>
<td>Annual Review</td>
</tr>
<tr>
<td>Template Status</td>
<td>Active</td>
</tr>
<tr>
<td>Review sections</td>
<td>General Instructions, Compliance, Goals, Competencies, Developmental Comments, Employee Details, Acknowledgement</td>
</tr>
<tr>
<td>Use section weights</td>
<td>Yes</td>
</tr>
<tr>
<td>Goals Rating Scale</td>
<td>Three Point</td>
</tr>
<tr>
<td>Goals Section Weight</td>
<td>75%</td>
</tr>
<tr>
<td>Competencies Rating Scale</td>
<td>Three Point</td>
</tr>
<tr>
<td>Competencies Section Weight</td>
<td>25%</td>
</tr>
<tr>
<td>Contributor Path</td>
<td>Employee &gt; Manager</td>
</tr>
<tr>
<td>Use additional contributor feedback</td>
<td>No</td>
</tr>
<tr>
<td>Rating Scale Display Option</td>
<td>Display both numerical rating and rating name</td>
</tr>
</tbody>
</table>
Review Templates

Review Configuration
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Competency Management
1. Add Competency Types
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Distribute/Schedule Reviews
Distribute a Review

- If an employee associated with the distribution does not have active goals/competencies the distributor will be notified and the employee will not be part of the distribution.

- Once distributed, an e-mail notification with instructions is sent to the first contributor identified in the contributor path.

- Once completed, the review displays in the History section of the employee’s Reviews page.
Demonstration
Distribute a Review
## Distribute a Review

### Review Templates

<table>
<thead>
<tr>
<th>Title</th>
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</tbody>
</table>

101
Distribute a Review

Distribute Reviews
Sales Manager Annual Review
2015 Sales Manager Annual Review

Review Details
Select the review template and add a title for the distributed review.

- **Review Template**: Sales Manager Annual Review
- **Description**: Annual Performance Review template for Sales Managers
- **Review Title**: 2015 Sales Manager Annual Review

- **Upon approval, update employee’s current review rating information.**

Review Dates
Select contributor(s) due dates and the review effective date.

- **Employee due date**: MM/DD/YYYY
- **Manager due date**: MM/DD/YYYY
- **Effective date**: 07/03/2015
Select Employees

Select Options

Select employees to distribute the review based on the following options:

- Use qualifiers to automatically select employees
- Select specific employees

Qualifiers

Select employees to send this review to by using qualifiers (filters). Click Add to add a qualifier.

This review will be distributed to employees who match the following qualifiers:

Show Employees Matching The Qualifiers Selected Below

<table>
<thead>
<tr>
<th>Qualifier</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Title</td>
<td>Sales Manager</td>
</tr>
</tbody>
</table>

Exclude New Hires?

Date in Job is less than 180 days from distribution date
## Distribute a Review

### Sales Manager Annual Review

#### 2015 Sales Manager Annual Review

### Distribute Reviews

#### Summary

**Request Information**

<table>
<thead>
<tr>
<th>Distribute Reviews</th>
<th>Before</th>
<th>Submitted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review Template</td>
<td>New</td>
<td>Sales Manager Annual Review</td>
</tr>
<tr>
<td>Review Title</td>
<td>New</td>
<td>2015 Sales Manager Annual Review</td>
</tr>
<tr>
<td>Upon approval, update employee’s current review rating information.</td>
<td>New</td>
<td>Yes</td>
</tr>
<tr>
<td>Employee due date</td>
<td>New</td>
<td></td>
</tr>
<tr>
<td>Manager due date</td>
<td>New</td>
<td></td>
</tr>
<tr>
<td>Manager’s manager due date</td>
<td>New</td>
<td></td>
</tr>
<tr>
<td>Effective date</td>
<td>New</td>
<td>07/03/2015 12:00:00 AM</td>
</tr>
</tbody>
</table>

**Qualifiers**

<table>
<thead>
<tr>
<th>Qualifiers</th>
<th>Before</th>
<th>Submitted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job title</td>
<td>New</td>
<td>Sales Manager</td>
</tr>
</tbody>
</table>
Schedule a Review

- Enables managers and administrators to automatically distribute reviews to a select group of employees.

- Talent Management > Review Schedules OR Talent Management > Review Templates
Goals and competencies do not need to be assigned before scheduling a review.

Administrator receives an email if any of the selected employees do not receive a review for any reason (for example, missing goals and/or competencies or a missing supervisor).
Demonstration
Schedule a Review
### Review Templates

<table>
<thead>
<tr>
<th>Title</th>
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<td>Annual Performance Review template for Sales Managers</td>
<td>Annual Review</td>
<td>Active</td>
<td>06/05/2015</td>
<td>06/05/2015</td>
</tr>
</tbody>
</table>
Schedule Review
Sales Manager Annual Review

Schedule Review

Review Details
Select the review template and add a title for the distributed review.

- **Review Template**: Sales Manager Annual Review
- **Description**: Annual Performance Review template for Sales Managers
- **Review Title**: Sales Manager Annual Review

- ✔️ Upon approval, update employee’s current review rating information.

Scheduling Information
When and how often do you want to distribute this review?

- **Start Date**: 06/06/2015
- **Is it recurring?**
  - No
- **Frequency**
  - Annually by Date in Job
  - 30 days before Date in Job

- ✔️ Add Distribution Date To The Review Title?
Schedule a Review

Schedule Title: Annual Schedule - Sales Managers

Description:

Status: Active

Review Dates:

**How many days from the distribution date does each contributor have to complete this review?**

Enter the number of days the below contributors will have from the review distribution date to complete the review. This will determine their due date, when review is distributed.

- **Employee**: 0 days after distribution
- **Manager**: 0 days after distribution
- **Effective**: 30 days after distribution
# Schedule a Review

**Sales Manager Annual Review**

## Schedule Review

<table>
<thead>
<tr>
<th>Field</th>
<th>Before</th>
<th>Submitted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review Template</td>
<td>New</td>
<td>Sales Manager Annual Review</td>
</tr>
<tr>
<td>Review Title</td>
<td>New</td>
<td>Sales Manager Annual Review</td>
</tr>
<tr>
<td>Upon approval, update employee's current review</td>
<td>New</td>
<td>Yes</td>
</tr>
<tr>
<td>rating information</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee due date</td>
<td>New</td>
<td></td>
</tr>
<tr>
<td>Manager due date</td>
<td>New</td>
<td></td>
</tr>
<tr>
<td>Manager’s manager due date</td>
<td>New</td>
<td></td>
</tr>
<tr>
<td>Effective date</td>
<td>New</td>
<td></td>
</tr>
<tr>
<td>Start date</td>
<td>New</td>
<td>06/06/2015 12:00:00 AM</td>
</tr>
<tr>
<td>Title</td>
<td>New</td>
<td>Annual Schedule - Sales Manager</td>
</tr>
<tr>
<td>Active</td>
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<td>Yes</td>
</tr>
<tr>
<td>Recurring</td>
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<td>Yes</td>
</tr>
<tr>
<td>Frequency</td>
<td>New</td>
<td>Annually</td>
</tr>
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</table>

## Qualifiers

<table>
<thead>
<tr>
<th>Field</th>
<th>Before</th>
<th>Submitted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job title</td>
<td>New</td>
<td>Sales Manager</td>
</tr>
</tbody>
</table>
Key Concepts - Recap

- Reviewed the Performance Management process flow.
- Reviewed the Talent Management settings.
- Configured review components (review ratings, rating scales, goal types, corporate goals, recommended goals, assignable goals, competency types, competencies, review types).
- Created a review template.
- Distributed a review.
- Scheduled a review.
Additional Resources

- Performance Management Administrator and Talent Management Administrator Learning Paths
- UltiEasy QuickTips
- Quick Tours
- Quick Casts
Thanks ...

... for participating in today's class!