

Finalize Goals and Complete Year-End



Finalize Goals

Before completing comments and holding Year-End conversations, review all Annual and Development Goals and make any necessary changes to ensure all is up-to-date. Once everything is updated, you will need to confirm this step by selecting the **Approve** button.

TIP: Be sure to check all spelling, grammar and content updates before completing this step. Once this process is complete, all information is "locked down" in the system and you will not be able to make any further adjustments to goal content.

1. If a review or re-refresh of the original goals is needed, click the **pencil icon** to update or modify any of the goals listed.
2. Be sure to **Save** all of your updates.
3. Next, click the **Approve** button in the top right hand corner. A confirmation message will immediately appear once this button is clicked.

Always remember to Save (Top Right Hand Corner) after you Update (At the Bottom), and before Sharing.

Manager Evaluation and Employee Acknowledgment

After the employee completes their Self Evaluation, **hold a conversation** with your employee to discuss their comments and feedback. Once completed, begin your **Manager Evaluation**.

1. Expand each goal and review the employee's comments and add any specific comments you have related to each goal in the text boxes provided. There will also be a **Year End Comments Summary** text box that will appear at the bottom of the page where you can provide a summary of achievements for the year.
2. Just above the summary text box, choose a Rating from the drop-down menu provided and add your notes in the **Manager Comments** text box provided.

Google Chrome is the recommended browser to use with this program.

3. Be sure to **Save** all of your updates. Once calibration has been completed and you have received approval to communicate final Ratings, click on the **Share with Employee** button. This will also advise the employee of the acknowledgement step. Have a conversation with your employee at this time to advise them of the final rating and associated merit allocation.

Once the employee has provided their acknowledgment, no other action is required and the Year End process in ePerformance will be complete and the form will automatically move to the **Historical Documents** section for future reference.

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