ePerformance Tip Sheet for Employees

This guide provides Employees information to complete TMG performance reviews via Mosaic. To access your ePerformance form, click on the Performance tile which can be found on the Employee Self Service page. Select the form for the appropriate fiscal year.

EMPLOYEE PERFORMANCE PROCESS STEPS:

The left hand column of the ePerformance form will always show you the current workflow and status of the form.

Workflow steps include:

- Define Goals
- Mid-Year
- Finalize Goals
- Complete Self Evaluation
- Review Manager Evaluation

Each stage will have a corresponding Due Date to be completed over the year. At McMaster, the TMG performance cycle runs from July 01 to June 30 of the following year. (e.g. July 1, 2017 – June 30, 2018).

The yellow circle icon indicates which Step the document is currently sitting at. In the example image to the left, the yellow circle icon beside the Define Goals Step indicates the employee is currently working on the Define Goals section.

Note: When a task or step has been completed, the yellow circle icon will turn green with a check mark.

1. DEFINE GOALS

This process is to be completed by employees in TMG for review and discussion with their manager prior to finalizing in the system.

Annual Goals should be created in alignment with our overall University strategy related to Forward with Integrity, as well as Department and Team level strategic and operational goals. For Development Goals, consider the skills, knowledge and capabilities that are required to successfully achieve these Annual Goals, and plan for the specific development activities and training that will enable personal and professional growth for current and future roles.
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NOTE: the Leader(ship) Capabilities will be considered as part of Year-End to capture achievement for the year but can also be used to assist in identifying opportunities for development.

Additional resources to support development conversations, self-assessment tools and career development can be found on the Employee Career Services website.

As a best practice, it is recommended that **4-6 Annual Goals and 1-2 Development Goals** are listed with the following supporting details:

- a) **Title and Description** – information about the goal itself
- b) **Action Plan** – outlining the steps in how the goal will be accomplished
- c) **Key Measures & Outcomes** – a description of what success looks like

Optional details:
- d) **Goal Type** – to identify the nature of the goal
- e) **Status** – can be updated as activities progress throughout the year
- f) **Weight** – assists in priority setting
- g) **Due Date** – to illustrate when the goal should ideally be achieved; allowing for project and program flexibility outside of year-end timeframes

Adding a Goal

To add a goal to the document, click the **Add Item** link. When adding an item, there are three different options:

1. Add pre-defined item (*functionality being explored*)
2. Add your own item (select this one)
3. Copy item from Business Objective (*functionality being explored*)

**IMPORTANT TIP** – Remember to save any progress by clicking the **Save** button at the top right corner.

Once saved, the message: ‘**You have successfully saved this document**’ will appear near the top of the document.

Once your Annual and Development Goals have been completed, **Notify** your manager by either clicking the appropriate button (see above) or by emailing your manager directly.
2. **MID-YEAR**

This is a time to review goal progress. As an employee, you will have the option to edit any of your goals and add overall **Mid-Year Comments** at the bottom of the page. These comments will not be visible to your manager until you click on the **Share with Manager** button at the top right of the page.

3. **FINALIZE GOALS:**

The Update task in the **Finalize Goals** Step provides employees the opportunity to update and review their existing goals. Once the goals have been updated (as needed), the employee will click the **Share with Manager** button.

4. **COMPLETE SELF EVALUATION:**

The **Self Evaluation** Step provides employees the opportunity to add **Achievements** and examples of **Leadership Capabilities** for each goal, plus overall **Year-End Comments** at the bottom of the page. The comments section for each goal can be used to highlight any specific notes including goal changes, barriers, accomplishments and findings. Employee comments will not be visible to managers until they click on the **Complete** button at the top right of the page.

5. **REVIEW MANAGER EVALUATION:**

During the **Review Manager Evaluation** Step, the manager will provide **Year-End Comments** and an overall **Manager Rating** for the employee. Once ratings have been finalized, the manager will share the document with the employee. The manager will request an **Acknowledgement** from the employee indicating the employee has read and discussed the document with their manager. Once completed, the form is routed to a Second Level Approver, who reviews and approves the document. This last step will mark the form as **Completed** and it will be saved under **My Historical Documents** which can be accessed by the employee and manager at any time.