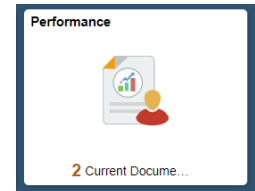# ePerformance Tip Sheet for Employees

This guide provides Employees with 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 current performance year.

If you do not have a performance document under "My Current Document", reach out to your HR representative or the Talent, Equity & Development (ted@mcmaster.ca) for support in launching.

Employee Performance Process Steps

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

Workflow steps include:

- **Goals and Progress**
- **Year-End Self Evaluation**
- **Year-End Manager Evaluation**

Each stage will have a suggested **Due Date**. At McMaster, the TMG performance cycle runs from July 01 to June 30 of the following year.

The yellow circle icon indicates which Step the document is currently sitting at. In the example image to the right, the yellow circle icon beside the **Goals and Progress** Step indicates the employee is currently working on this section. When a task or step has been completed, the yellow circle icon will turn green with a check mark.

Annual Goals
07/01/2019 - 06/30/2020

Goals and Progress
Due Date   05/30/2020
● Update

Year-End Self Evaluation
Due Date   06/30/2020
Update and Complete

Year-End Manager Evaluation
Due Date   07/24/2020
Acknowledge
View

1. Goals and Progress

This step is initiated by employees in TMG to review and discuss goals with their manager. Goals should be created to 1) align with our overall University strategy, as well as Department and Team level goals, and 2) plan for the specific development activities and training that will enable personal and professional growth for current and future roles.

As a best practice, it is recommended that **3-4 Annual Goals** and **1-2 Development Goals** are listed with the following supporting details:

a) **Title and Description** – an outline or brief summary of the goal
b) **Action Plan and Key Measures** – the steps required to accomplish the goal and a description of what success looks like (success measures)
c) **Progress Updates** – key accomplishments and updates noted throughout the year

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, use one of the highlighted options:
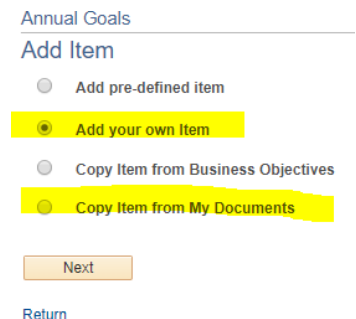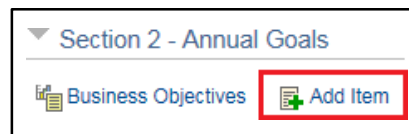
1. **Add your own item**
2. **Copy item from My Documents** (copies goals from previous year's forms, which can be edited for the current year)

> **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.
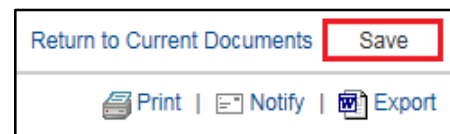
Once your Annual and Development Goals have been completed, have a discussion with your manager. Throughout the year, meet on a regular basis to review and discuss progress on goals and highlight key accomplishments, changes and opportunities for support and development. Goals can be edited throughout the year and progress updates made in the appropriate textbox.

NOTE: While a mid-year review is suggested, it is not required. Best practice is to hold more frequent discussions throughout the year.

Prior to year-end, your manager will approve your goals, which will lock them down in the system in advance of the year-end review. Goals should be approved in the system by managers by the end of April.

2. Year-End Self Evaluation

The **Self Evaluation** step provides you 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 you click on the **Complete** button at the top right of the page.

Please Note: Once your Self Evaluation has been completed, it **cannot** be re-opened or edited.
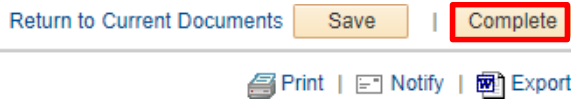
3. Year-End Manager Evaluation

During the **Year-End 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** indicating the employee has read and discussed the document with their manager. Once completed, the form will be marked as **Completed** and it will be saved under **My Historical Documents** which can be accessed by the employee and manager at any time.