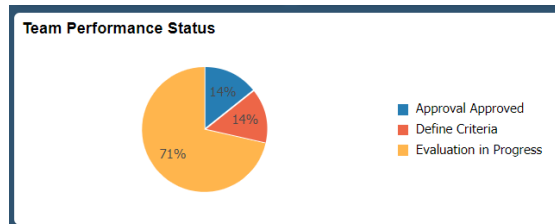
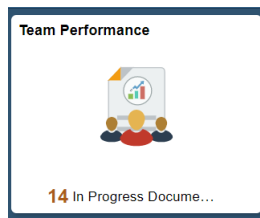


ePerformance Tip Sheet for Managers

This guide provides supplementary information for Managers using ePerformance with their Employees. To access the form(s) for your direct report(s) in Mosaic, select **Manager Self Service**, and click on the **Team Performance** tile. Select the form for the appropriate employee and fiscal year.

Note: There is also a **Team Performance Status** tile where you can view progress data for all employees in your span of control.



If you do not have access to the Team Performance tile, please reach out to your HR Representative or a member of the Talent, Equity & Development team (ted@mcmaster.ca).

Manager Performance Process Steps:

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

Workflow steps include:

- **Goals and Progress**
- **Review Self Evaluation**
- **Complete 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 left, 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 [Overview](#)

- Goals and Progress**
Due Date 05/30/2020
[Update and Approve](#)
- Review Self Evaluation
Due Date 06/30/2020
[View](#)
- Complete Manager Evaluation
Due Date 07/24/2020
[Update and Share](#)
Pending Acknowledgement



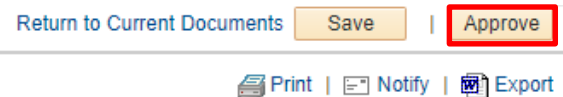
1. Goals and Progress

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.

Once Annual and Development Goals have been drafted, have a discussion with your employee. Then 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. As a manager, you will have the ability to edit your employee's goals at any time or add new ones.

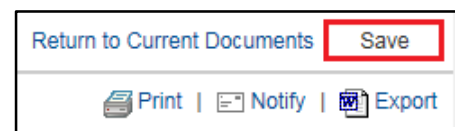
NOTE: While a mid-year review is suggested, it is not required. Best practice is to hold more frequent discussions throughout the year.

By the end of April, **approve** the employee's goals in the system, which will lock them down in advance of the year-end review.



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.



2. Review Self Evaluation

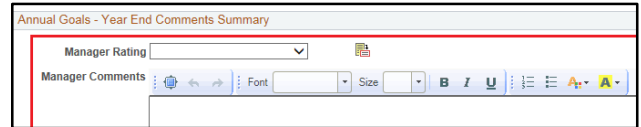
During this step, the employee will add their goal achievements, leadership capability examples and comments to the document. Once the employee has completed their updates, their document will be shared with you, their manager, for review and Year-End discussion. This will activate the **Complete Manager Evaluation** step for you to begin.

NOTE: Once an employee has completed their self-evaluation in the system, it cannot be edited or re-opened.



3. Complete Manager Evaluation

During this step, you can add goal-specific comments, overall Year-End Comments, and an overall Rating. You can also attach any supplementary supporting documents here at this time.



Do not share the rating with the employee immediately. Once you have received confirmation that calibration has been completed, goal specific comments, overall year end comments and the rating can be shared. To do so click the **Share with Employee** button.

At this time, ensure that you meet with your employee to review and discuss their evaluation. Once the employee has completed their acknowledgment, the document will be marked as **Completed** and moved into the **Historical Documents** section.

