

My HR Connection Performance Training Guide

Manager – Step 3 Annual Performance and Development Conversation

Revision History

Version	Date	Description
1.0	Dec 17, 2018	Initial Draft
1.1	February 8, 2019	Updates
1.2	March 25, 2019	Logo and rebranding

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1. Introduction

1.1. Objectives

Upon completion of this manual, you will be able to:

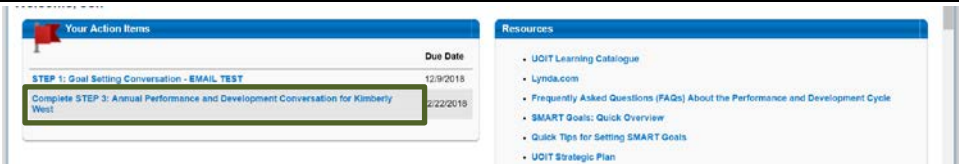
- Understand the process for Step 3: Performance and Development Conversation from the role of a Manager.
- Successfully complete the required tasks of the Manager in My HR Connection.

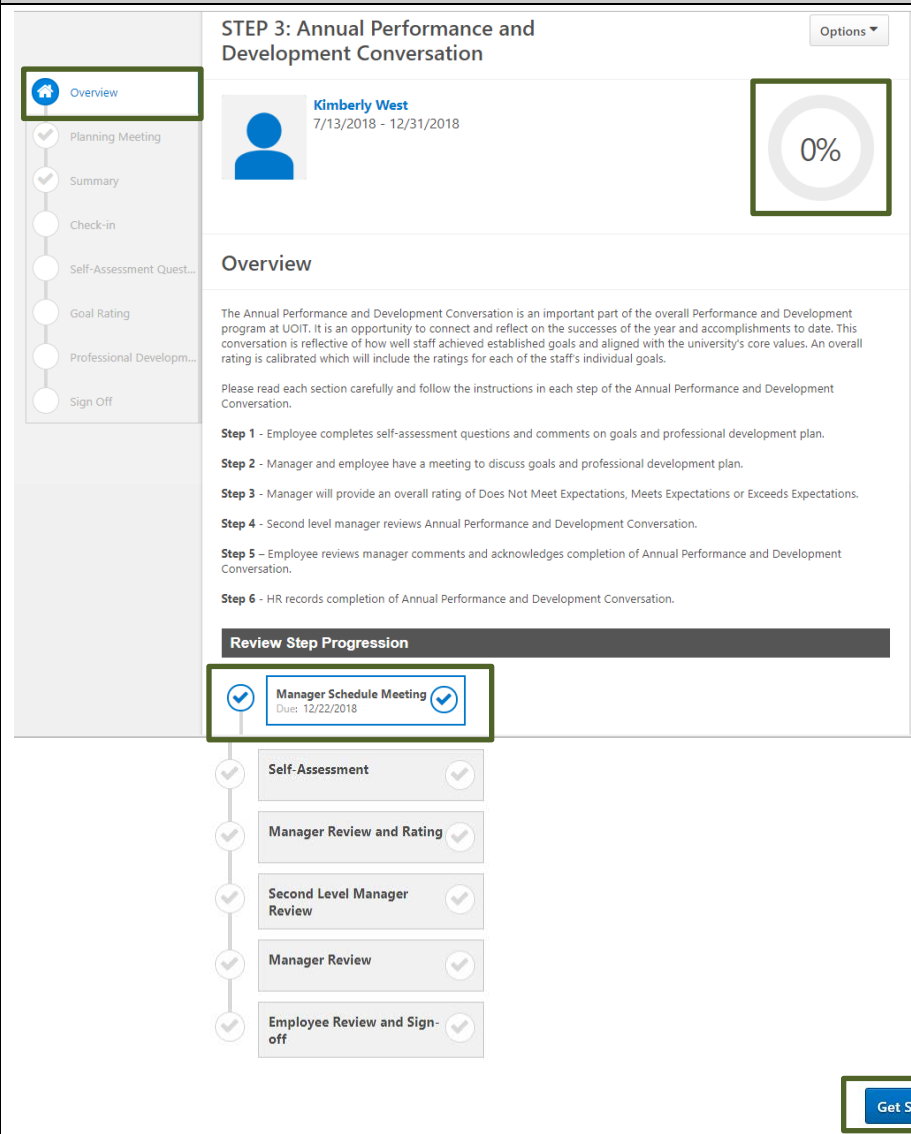
2. Annual Performance and Development Conversation Process

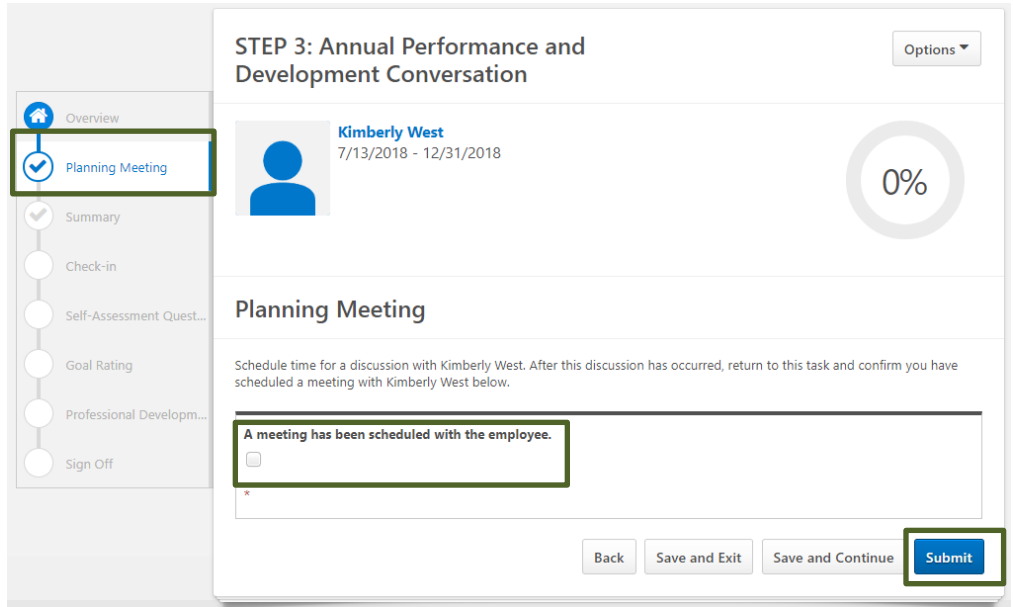
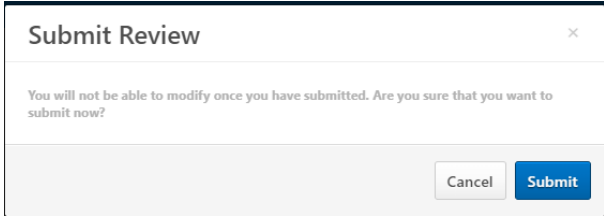
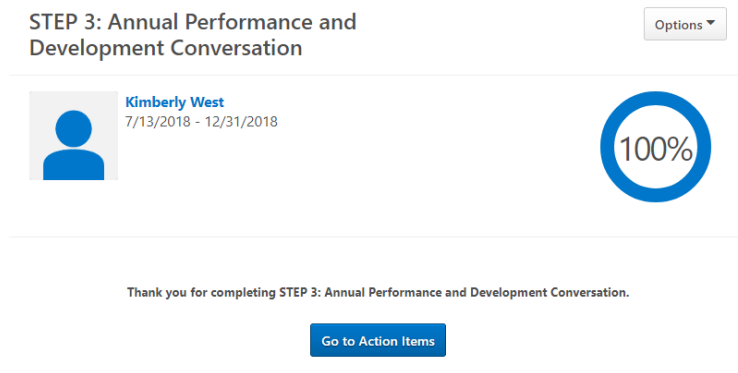


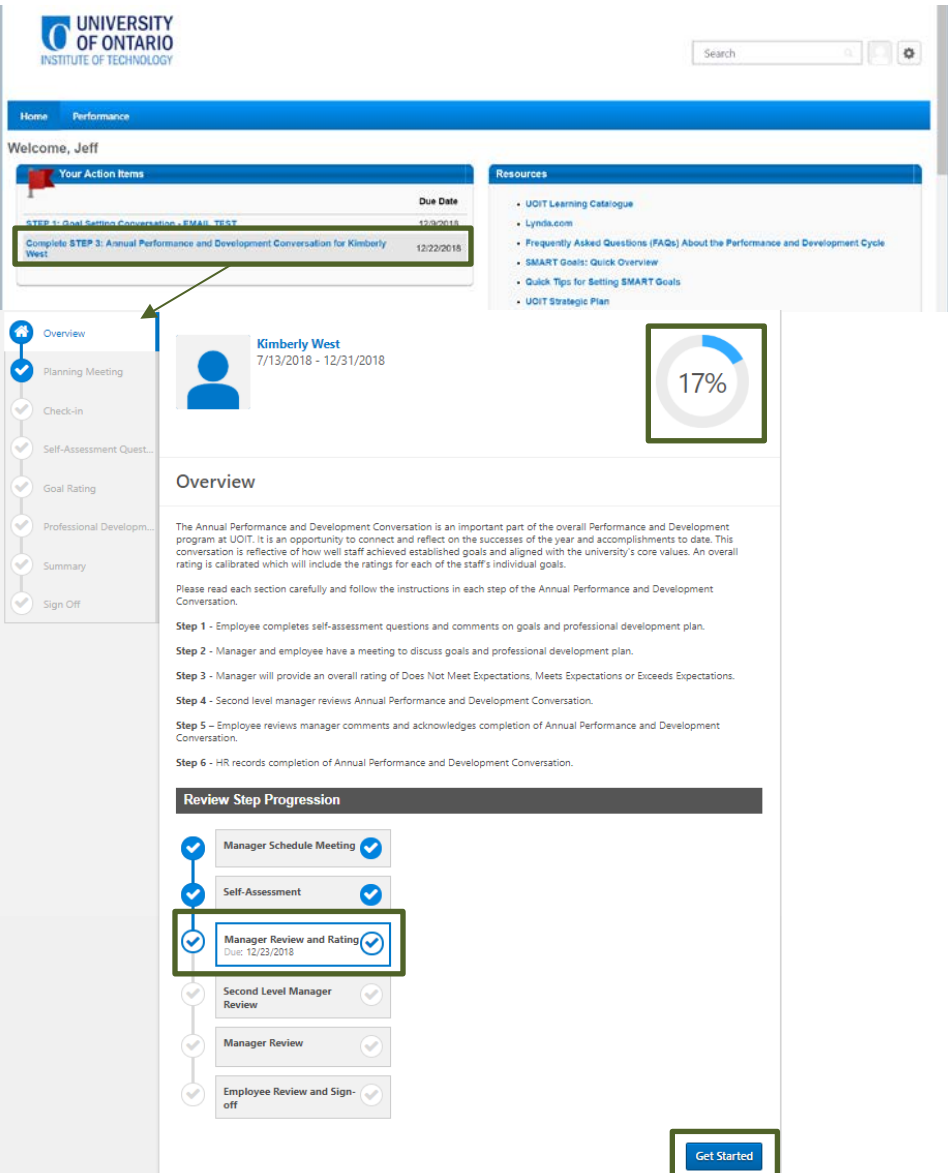
Figure 1: Annual Performance and Development Conversation Business Process

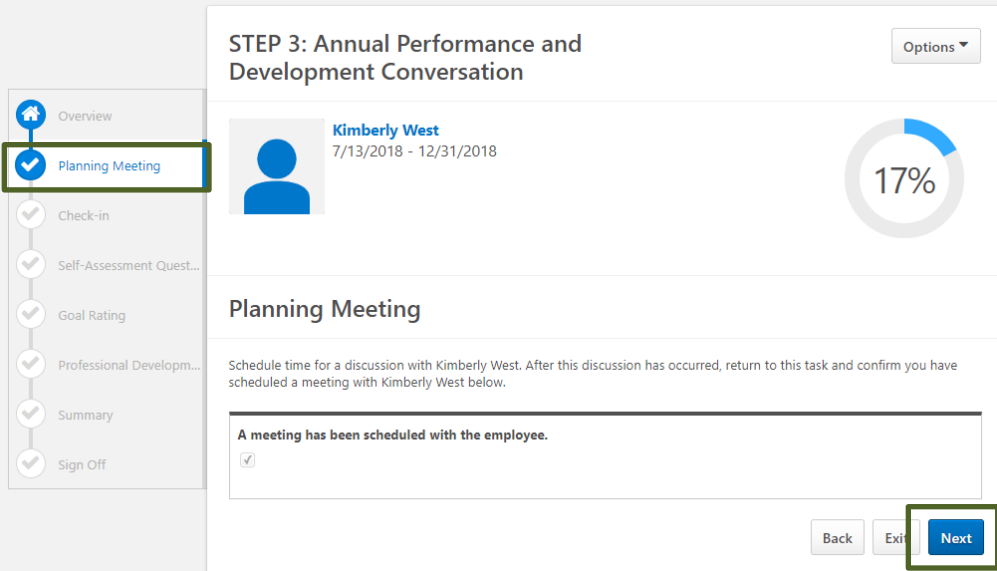
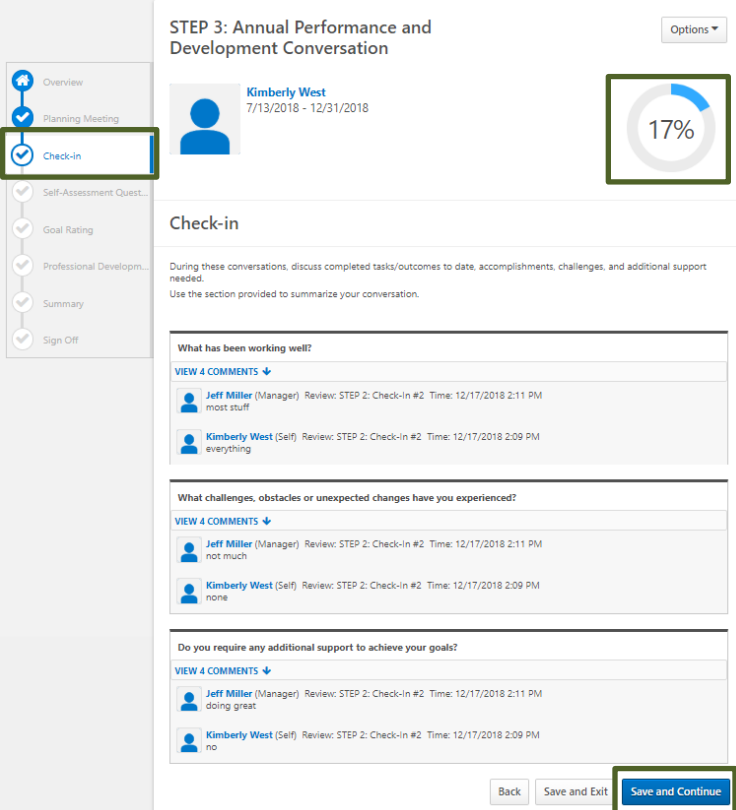
3. Steps for completing the Annual Performance in My HR Connection

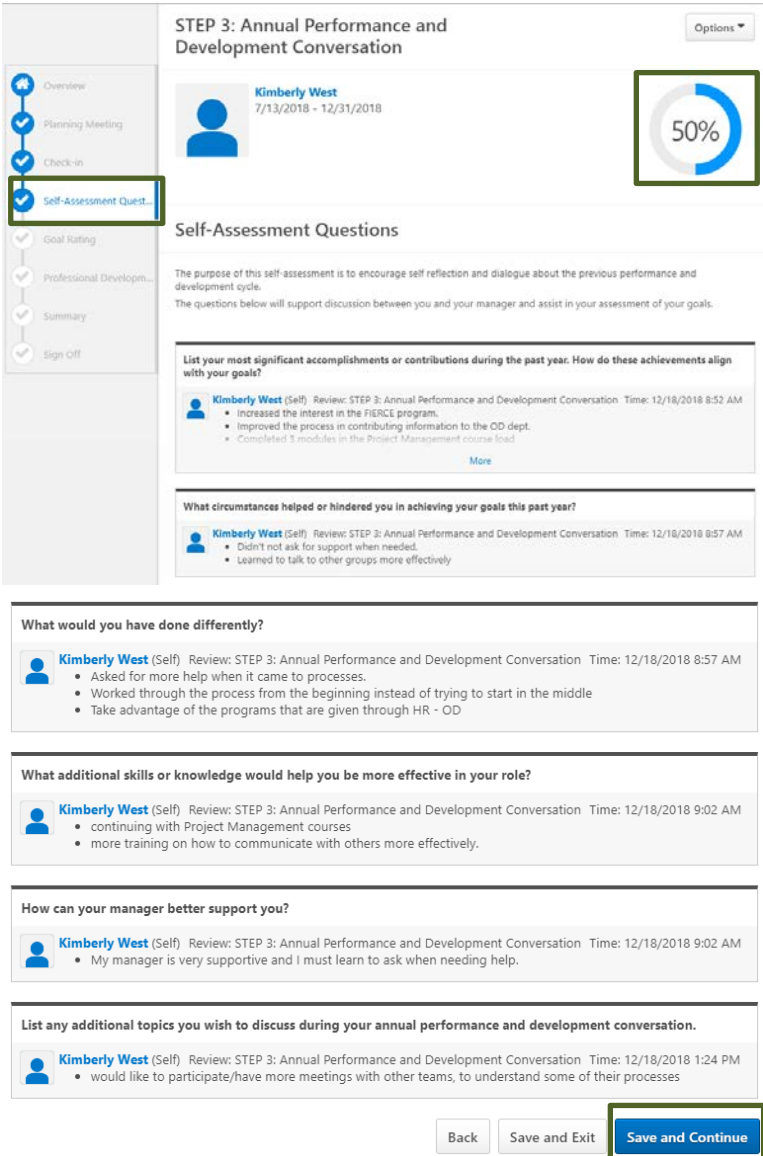
	Action	Steps to Execute
1	You will receive an email notification to complete Step 3: Annual Performance and Development Conversation	Receive Email in Outlook
2	Log in to My HR Connection and select the related task for your Staff Member.	 <p>The screenshot shows the 'My HR Connection' interface. On the left, under 'Your Action Items', there is a list of tasks. The task 'Complete STEP 3: Annual Performance and Development Conversation for Kimberly West' is highlighted with a green box. To the right, under 'Resources', there is a list of links including 'UOIT Learning Catalogue', 'Lynda.com', 'Frequently Asked Questions (FAQs) About the Performance and Development Cycle', 'SMART Goals: Quick Overview', 'Quick Tips for Setting SMART Goals', and 'UOIT Strategic Plan'.</p>

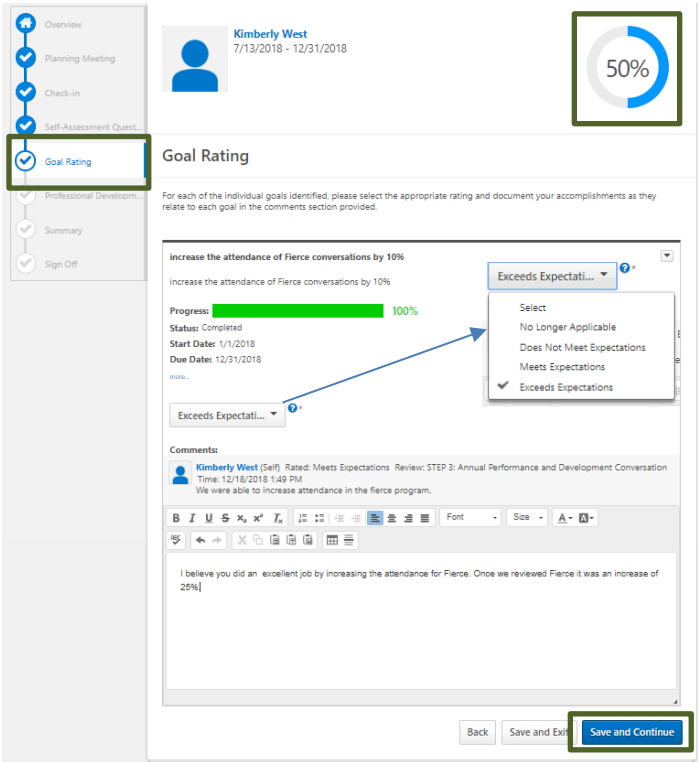
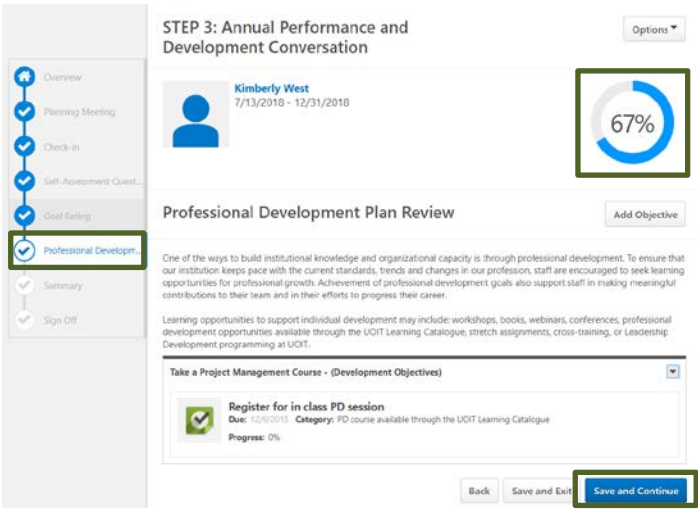
	Action	Steps to Execute
3	<p>Read the Overview of the task.</p> <p>Scroll down and click Get Started to launch the task.</p>	

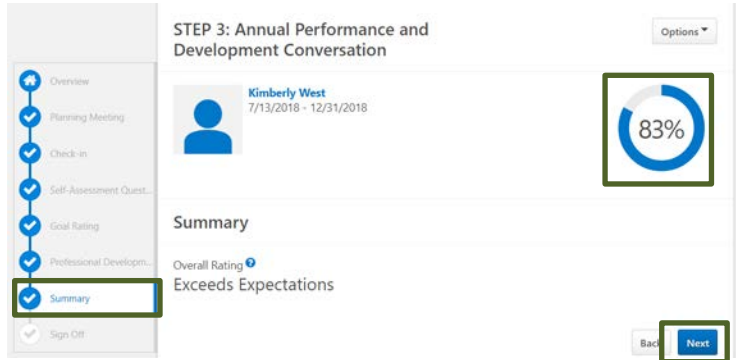
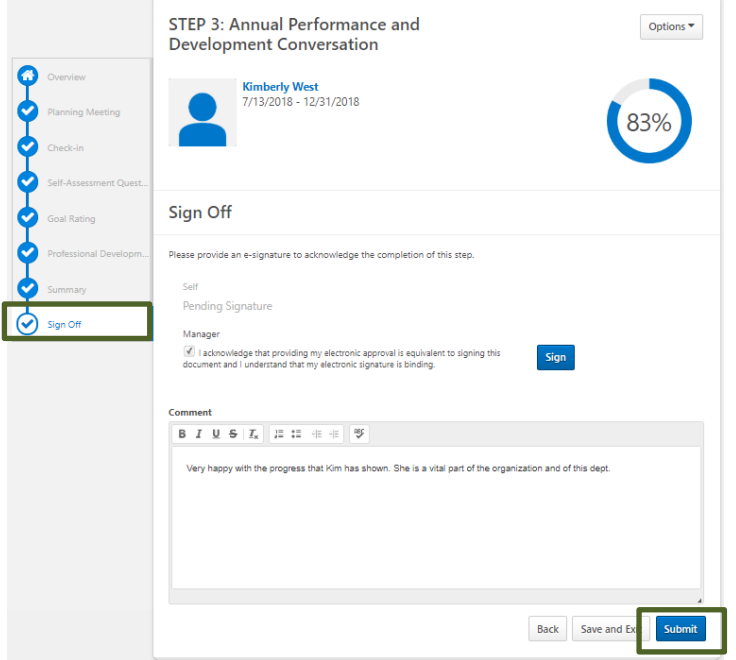
	Action	Steps to Execute
4	<p>Setting up the Planning Meeting</p> <p>Check the box indicating that the meeting is scheduled with the Staff Member.</p> <p>Click Submit.</p>	
5	<p>You will be prompted to submit again.</p> <p>Click Submit.</p>	
6	<p>Once you are done you can click Go to Action Items. This will take you back to the Action List to setup meetings for other Staff Member's Performance and Development Conversations.</p>	

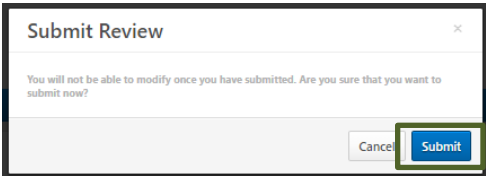
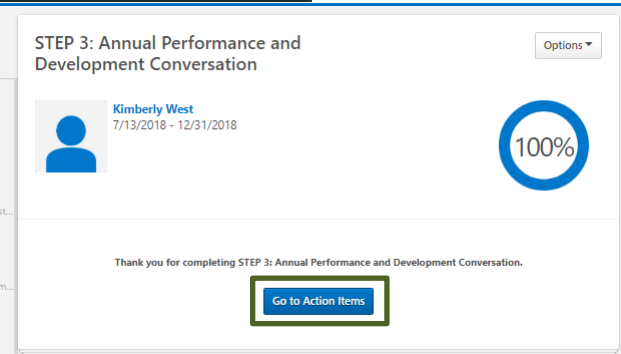
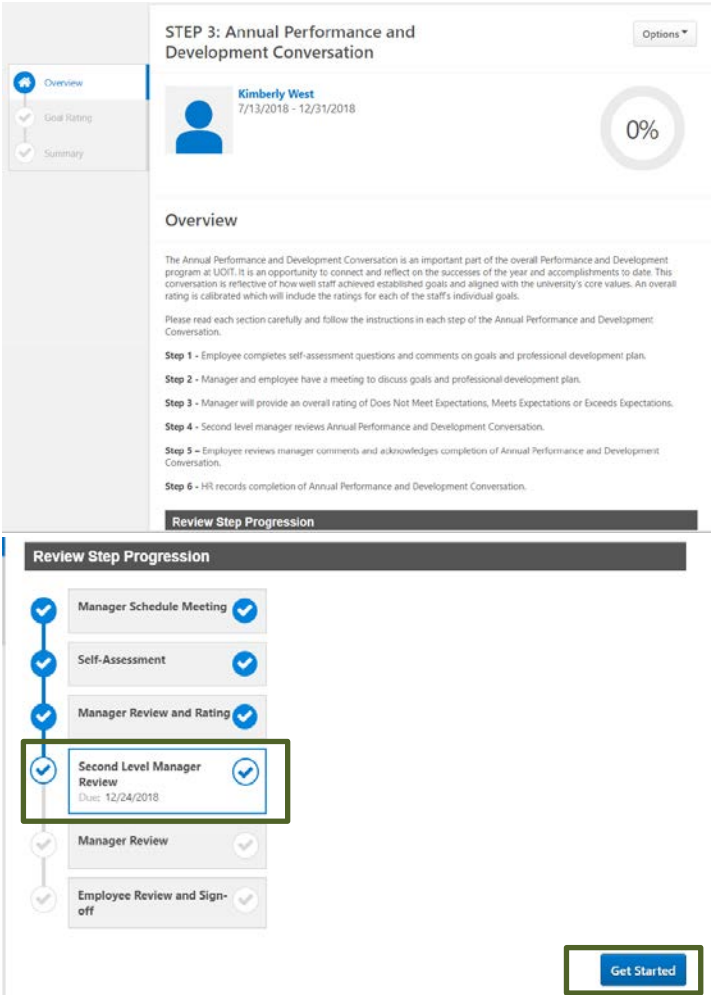
	Action	Steps to Execute
7	<p>Once the Staff Member has completed their Self-Assessment, you will receive an email to return to the online application and complete your portion of the Annual Performance and Development Conversation.</p> <p>When you return to My HR Connection, click on the task in the Action Items which corresponds with the Staff Member your need to review. Click Get Started.</p>	

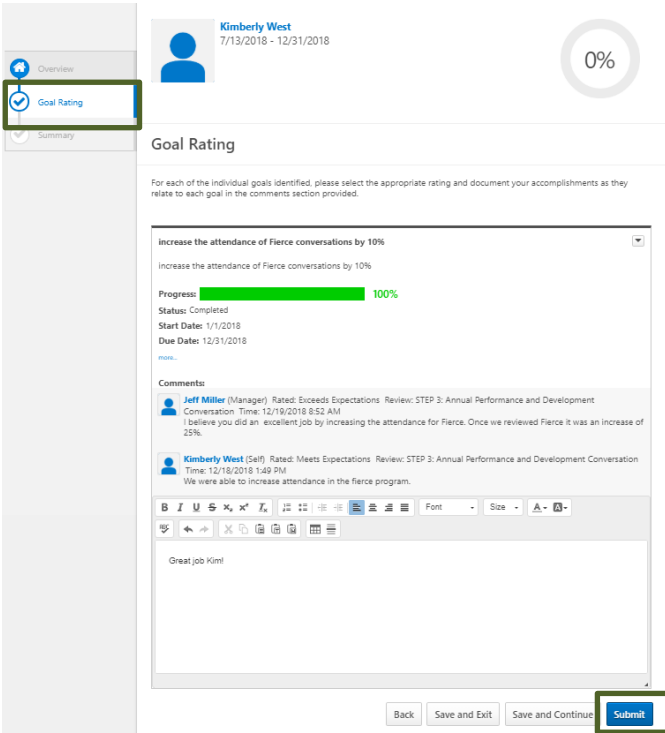
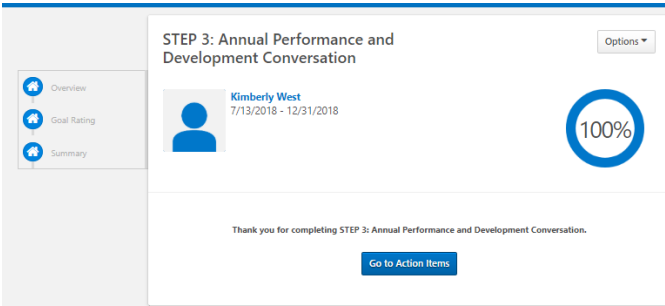

	Action	Steps to Execute
8	<p>This step is a reminder that you have setup the Performance and Development Conversation.</p> <p>Click Next.</p>	
9	<p>In this section, you can review the Step 2: Check-in Conversations you have completed during the cycle with your Staff Member.</p> <p>Click Save and Continue.</p>	

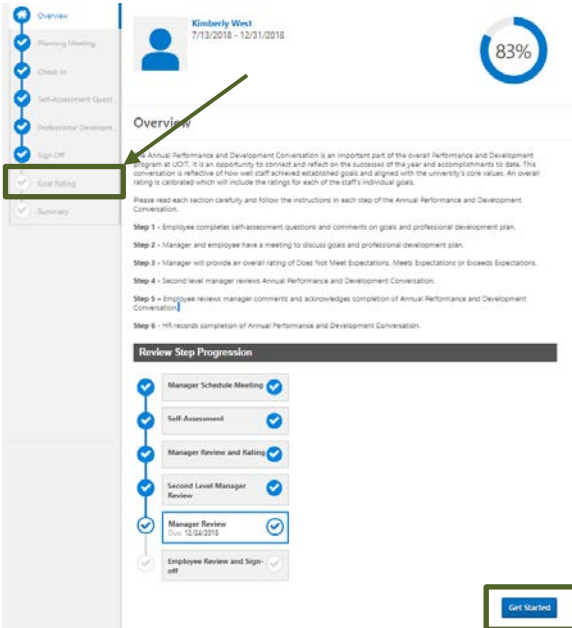
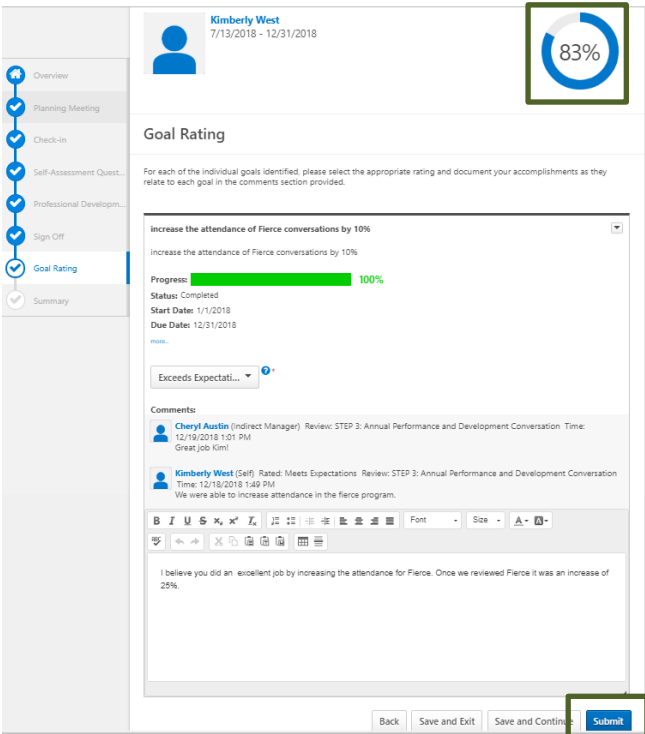
	Action	Steps to Execute
10	<p>Review the Self-Assessment questions completed by the Staff Member to help inform your overall assessment.</p> <p>Click Save and Continue.</p>	

	Action	Steps to Execute
11	<p>This is the Goal Rating page.</p> <p>In this section you will review the self-assessment by the Staff Member and their comments.</p> <p>You are able to select from the dropdown the rating you would like to give the Staff Member on each completed goal. Provide comments to support your rationale.</p> <p>Click Save and Continue.</p>	
12	<p>The Professional Development Plan Review page shows the status of the Staff Member's professional development plan.</p> <p>Review this section.</p> <p>Click Save and Continue.</p>	

	Action	Steps to Execute
13	<p>In this section, you will see your overall rating for this Staff Member.</p> <p>Click Next.</p>	
14	<p>In this section you can add any additional comments from the Performance Development Conversation.</p> <p>Click the check box to sign off on the Performance Development Conversation and complete Step 3 for this Staff Member.</p> <p>After checking the sign off box, click Submit.</p>	

	Action	Steps to Execute
15	<p>Click Submit again if you are happy with the outcome, or Cancel to start again.</p> <p>Once you are done, you can select Go to Action Items. This will take you back to the Action List to complete tasks for other Staff Members.</p>	 
16a	<p>16a to 16d of this guide provides direction for Second Level Managers within the unit.</p> <p>As a Second Level Manager, your role in Step 3 Performance Development Conversation is to review the goals and rating of the indirect reports in your area.</p> <p>Click Get Started to review the goals and rating of the indirect report in your unit.</p>	

	Action	Steps to Execute
16b	<p>You are able to view the goals of the Staff Member and the rating provided by the Manager in your area. Review comments made and add additional comments as appropriate.</p> <p>Click Submit when finished.</p>	
16c	<p>Once you have submitted your comments, you can click Go to Action Items which will return you to the Home page.</p>	
16d	<p>At the Home page, you can continue the process for other staff in your area.</p>	

	Action	Steps to Execute
17	<p>As a first level manager, you are now in the last step of the Manager review.</p> <p>Clicking Get Started will take you through the different phases of Step 3 so that you can review the comments of the Second Level Manager in your area.</p> <p>Click Goal Rating in the sidebar menu.</p>	
18	<p>In the Goal Rating section you are able to see what the Second Level Manager has entered.</p> <p>When you are finished reviewing this information, Click Submit.</p> <p>Click Submit again.</p>	

	Action	Steps to Execute
19	You have now completed your review of Step 3. Click Go to Action Items. This will take you back to the Action List to complete other Staff Member Step 3 Performance Development Conversations.	