

# Performance Review Guide – Managers

Log in to TBR Connector:

[https://tbr.csod.com/default.aspx?ReturnUrl=https%3a%2f%2ftbr.csod.com%2fLMS%2fcatalog%2fWelcome.aspx%3ftab\\_page\\_id%3d-67%26tab\\_id%3d-1](https://tbr.csod.com/default.aspx?ReturnUrl=https%3a%2f%2ftbr.csod.com%2fLMS%2fcatalog%2fWelcome.aspx%3ftab_page_id%3d-67%26tab_id%3d-1)

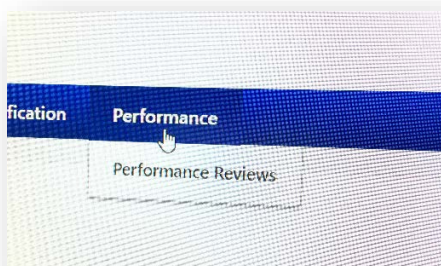
Username: e-mail address

PW: Welcome1! (First time users)

## Manager's Review

**Note:** The first step “Goal Planning” (goals for the upcoming year) is to be completed by the employee. You will be able to review, edit, and/or add goals if needed.

To start the review of your employee, click on **Performance > Performance Reviews**



Click **Complete Manager Review of** – *employee name under My Assigned Reviews Tab*

My Assigned Reviews    My Personal Reviews

Title:

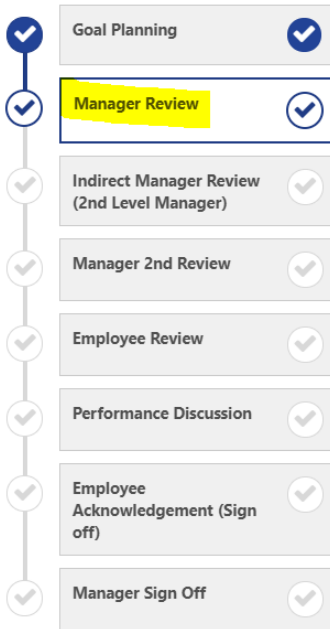
Show completed and expired tasks

Title	Description	Status	Start Date	Due Date
Complete Goal Progress and Planning	Executive staff performance evaluation	In Progress	10/18/2018	2/15/2019
Complete Indirect Manager Review of Blanca Bryson	Performance evaluation with indirect manager	Not Started	11/30/2018	12/5/2018
Complete Manager Review of Holly Girgjes	Executive staff performance evaluation	Not Started	11/26/2018	2/28/2019
Complete Manager Review of Holly Girgjes	Performance evaluation with indirect manager	Not Started	11/29/2018	2/28/2019

# Overview

Click **Get Started** to initiate the employee Review.

## Review Step Progression



**Get Started**

## Review Upcoming Year's Goals (2019)

Manager: Review, add comments, edit, and/or add additional employee goals > **Save and Continue**

### Goal Planning Section

**Employee Instructions:** Please add, edit, or cancel your goals for the upcoming performance year. You can upload any corresponding documentation. Your goals will be reviewed and approved by your supervisor. Click "Submit" when all your goals are entered.

**Manager Instructions:** Review employee's goals for the upcoming performance year. Review, update, edit, approve or cancel each goal. Once complete, click "Save and Continue".

**Task and Project Management**

**New - Please Review**

Establishes attainable objectives and timelines, establishes and communicates priorities, recognizes and responds effective to unexpected situations; handles crucial situations and pressures calmly and effectively; accepts unexpected assignments and responds well to tight time deadlines.

**Progress:** 0%

**Status:** Not started  
**Start Date:** 1/1/2019  
**Due Date:** 12/31/2019

**Comments:**

Holly Girgias (Manager) Review: Performance Evaluation v5 Time: 2/5/2019 2:49 PM  
Goal looks good Blanca (Comments by Holly - test) Save and Continue

Upcoming year's comments by April - test

**Back** **Save and Exit** **Save and Continue**

# Competency Assessment

Rate employee's competencies and add any comments. To go to the next section, click on **Next**

## TBR Staff Competency Assessment

**Manager Instructions:** Proceed through each item, selecting the appropriate rating and entering corresponding comments.

- Exceeds Expectations: Has consistently exceeded performance expectations.
- Satisfactory: Has consistently performed at the expected level.
- Needs Improvement: Minor improvements were identified and discussed during the rating period.
- Unsatisfactory: Is not performing at the expected level.
- N/A: Employee is not in a supervisory position or too new to rate.



### Job Knowledge - TBR Staff

Demonstrates knowledge necessary to carry out job responsibilities, seeks out new job information, possesses a working knowledge of policies and procedures.

\*

N/A



E



S



N



U



[Rating History](#)

### Comments:

Rich text editor toolbar with options for Bold, Italic, Underline, Strikethrough, Bulleted List, Numbered List, Indent, Outdent, Font, Size, and text color. Below the toolbar is a large text area for entering comments.

Back    Exit    **Next**

## Overall Rating

Rate employee's overall performance > **Select**

Add comments > **Save and Continue** > **Submit**. The review will advance to the next step > Indirect Manager Review

### Overall Rating

Rate the employee's overall performance.

Overall Rating

Select

- ✓ Select
- Unsatisfactory
- Needs Improvement
- Satisfactory
- Exceeds Expectations

Back Next

## Indirect Manager Review (2<sup>nd</sup> Level Manager)

After the Manager completes their review, the Indirect Manager will be able to view and add comments to the review.

Click on **Get Started**

Review Step Progression

- ✓ Goal Progress and Planning (Upcoming Year)
- ✓ Manager Review
- ✓ Indirect Manager Review (Second Level Manager)
- ✓ Manager 2nd Review
- ✓ Employee Review
- ✓ Performance Discussion
- ✓ Employee Acknowledgement
- ✓ Manager Sign Off

Reopen Step Get Started

# Goal Planning – 2019 Goals

Review goals and add comments if necessary > **Next**



**Employee Name**  
Position  
1/1/2018 - 12/31/2018

**NOTE: All comments entered by the Manager & Indirect Manager in the goal section, are visible to employees.**

## Goal Planning Section

**Employee Instructions:** Please add, edit, or cancel your goals for the upcoming performance year. You can upload any corresponding documentation. Your goals will be reviewed and approved by your supervisor. Click "Submit" when all your goals are entered.

**Manager Instructions:** Review employee's goals for the upcoming performance year. Review, update, edit, approve or cancel each goal. Once complete, click "Save and Continue".

Back **Next**

## Goal Planning Section

**Employee Instructions:** Please add, edit, or cancel your goals for the upcoming performance year. You can upload any corresponding documentation. Your goals will be reviewed and approved by your supervisor. Click "Submit" when all your goals are entered.

**Manager Instructions:** Review employee's goals for the upcoming performance year. Review, update, edit, approve or cancel each goal. Once complete, click "Save and Continue".

**Task and Project Management**

**New – Please Review**

Establishes attainable objectives and timelines, establishes and communicates priorities, recognizes and responds effectively to unexpected situations; handles crucial situations and pressures calmly and effectively; accepts unexpected assignments and responds well to tight time deadlines.

**Progress:**  0%

**Status:** Not started

**Start Date:** 1/1/2019

**Due Date:** 12/31/2019

more...

**Comments:**

**Holly Girgias** (Manager) Review: Performance Evaluation v5 Time: 2/5/2019 2:49 PM  
Goal looks good Blanca (Comments by Holly - test)Save and Continue

**Rich Text Editor:** B I U S x<sub>2</sub> x<sup>2</sup> I<sub>x</sub> Font Size A- A+

**Highlighted Comment:** Upcoming year's comments by April - test.

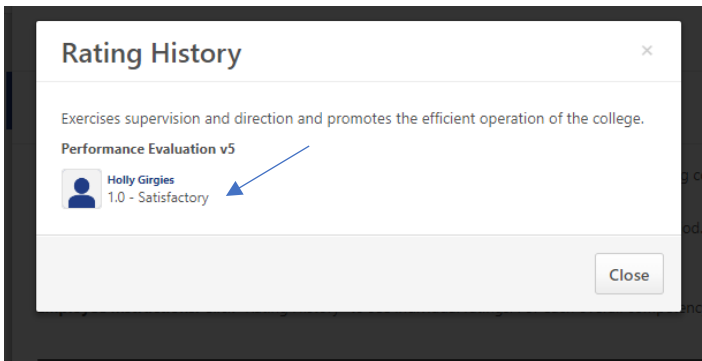
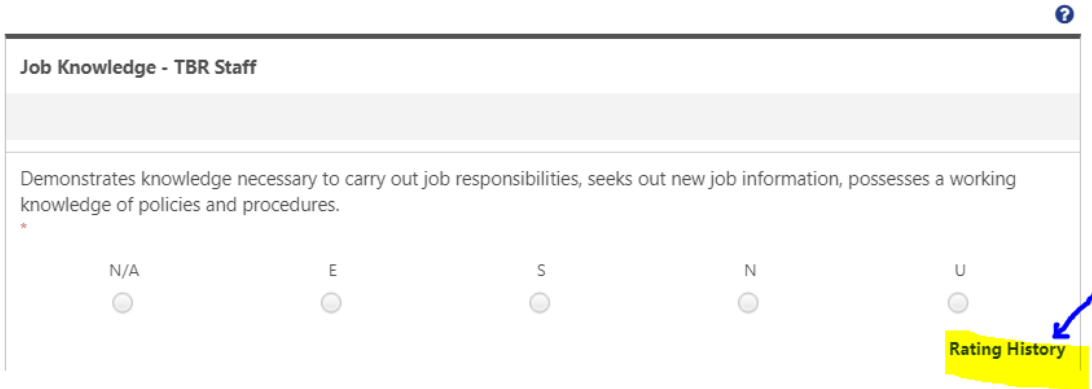
# Competency Assessment

Click on **Rating History** to view the Manager's Competency assessment rating.

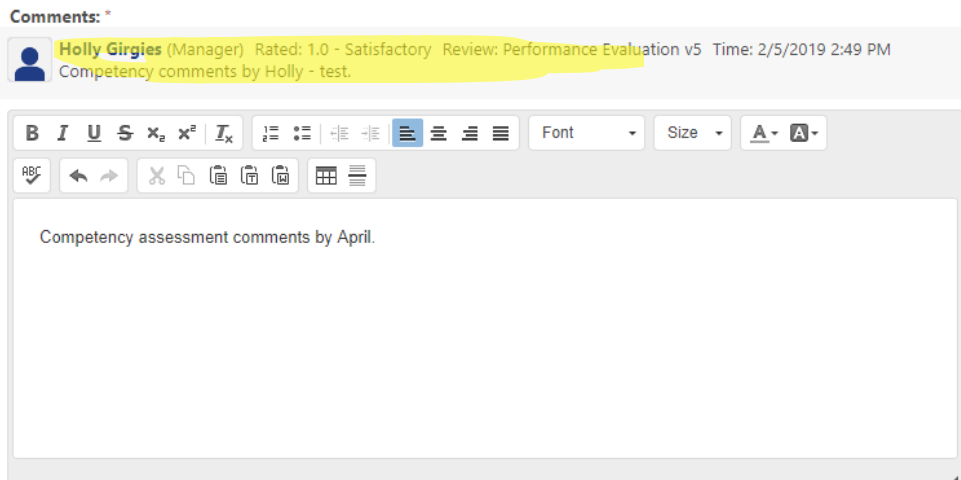
## TBR Staff Competency Assessment

**Manager Instructions:** Proceed through each item, selecting the appropriate rating and entering corresponding comments.

- Exceeds Expectations: Has consistently exceeded performance expectations.
- Satisfactory: Has consistently performed at the expected level.
- Needs Improvement: Minor improvements were identified and discussed during the rating period.
- Unsatisfactory: Is not performing at the expected level.
- N/A: Employee is not in a supervisory position or too new to rate.



Review comments from the Manager and add comments if necessary.



## Overall Rating

Review Manager's Overall Rating and comments > Add comments if necessary > **Submit**

The review will go back to the Manager to make any necessary revisions.

Overall Rating

Rate the employee's overall performance.

Overall Rating

Rate the employee's overall performance:

Holly Girgias (Manager) Rated: 3 - Satisfactory Review: Performance Evaluation v5 Time: 2/5/2019 2:51 PM  
Overall rating comments by Holly - test

B I U S X<sup>2</sup> I<sub>n</sub> Font Size

Overall rating comments by April - test

Back Save and Exit Save and Continue Submit

## Manager's 2<sup>nd</sup> Review

After the Indirect Manager has completed their review, the Manager will have an opportunity to make any revisions as necessary. Click on **Get Started**

Review Step Progression

- Goal Progress and Planning (Upcoming Year)
- Manager Review
- Indirect Manager Review (Second Level Manager)
- Manager 2nd Review** (Due: 2/7/2019)
- Employee Review
- Performance Discussion
- Employee Acknowledgement
- Manager Sign Off

Reopen Step Get Started

## Review Indirect Manager's comments:

(Note: Comments made by the Manager and Indirect Manager in the goal section **are** visible to the employee)

### Goal Planning Section

**Employee Instructions:** Please add, edit, or cancel your goals for the upcoming performance year. You can upload any corresponding documentation. Your goals will be reviewed and approved by your supervisor. Click "Submit" when all your goals are entered.

**Manager Instructions:** Review employee's goals for the upcoming performance year. Review, update, edit, approve or cancel each goal. Once complete, click "Save and Continue".

**Test goal 10**

New – Please Review

Test goal 10

**Progress:**  **0%**

**Status:** Not started

**Start Date:** 7/1/2018

**Due Date:** 6/30/2019

more...

**APRIL PRESTON** (Indirect Manager) Review: Performance Evaluation v3 Time: 2/5/2019 12:19 PM  
Test goal planning goal.  
April - test comments

More

## Competency Assessment:

Review Indirect Manager's comments, if any. Click on **Next**

### TBR Staff Competency Assessment

**Manager Instructions:** Proceed through each item, selecting the appropriate rating and entering corresponding comments.

- Exceeds Expectations: Has consistently exceeded performance expectations.
- Satisfactory: Has consistently performed at the expected level.
- Needs Improvement: Minor improvements were identified and discussed during the rating period.
- Unsatisfactory: Is not performing at the expected level.
- N/A: Employee is not in a supervisory position or too new to rate.

**Job Knowledge - TBR Staff**

Demonstrates knowledge necessary to carry out job responsibilities, seeks out new job information, possesses a working knowledge of policies and procedures.

N/A      E      S      N      U

**APRIL PRESTON** (Indirect Manager) Rated: N/A - Review: Performance Evaluation v5 Time: 2/5/2019 2:55 PM  
Competency assessment comments by April - test.

**Holly Girgias** (Manager) Rated: 1.0 - Satisfactory Review: Performance Evaluation v5 Time: 2/5/2019 2:49 PM  
Test competency assessment comments by Holly.

[Back](#) [Exit](#) [Next](#)



## Overall Rating

View Indirect Manager's comments.

Save and continue or > **Submit** if the review is ready for the employee to view.

**The Review will advance to the employee. Note: Employee will now be able to see the Overall Rating and Competency Assessment.**

The screenshot shows the 'Overall Rating' form. At the top, it says 'Rate the employee's overall performance.' Below this is a box titled 'Overall Rating' containing the text 'Rate the employee's overall performance:'. Underneath, it displays 'Holly Girgias (Manager) Rated: 3 - Satisfactory Review: Performance Evaluation v5 Time: 2/5/2019 2:51 PM' and 'Overall rating comments by Holly - test'. A rich text editor follows, with a toolbar and a text area containing 'Overall rating comments by April - test'. At the bottom, there are four buttons: 'Back', 'Save and Exit', 'Save and Continue', and 'Submit'.

## Performance Discussion > Get Started

After the employee has completed the Employee Review, the Manager should schedule the Performance Discussion. Once the discussion has taken place, acknowledge completion of the Performance Discussion and add any comments > **Submit**.

**The review will advance to the employee to acknowledge and sign off.**

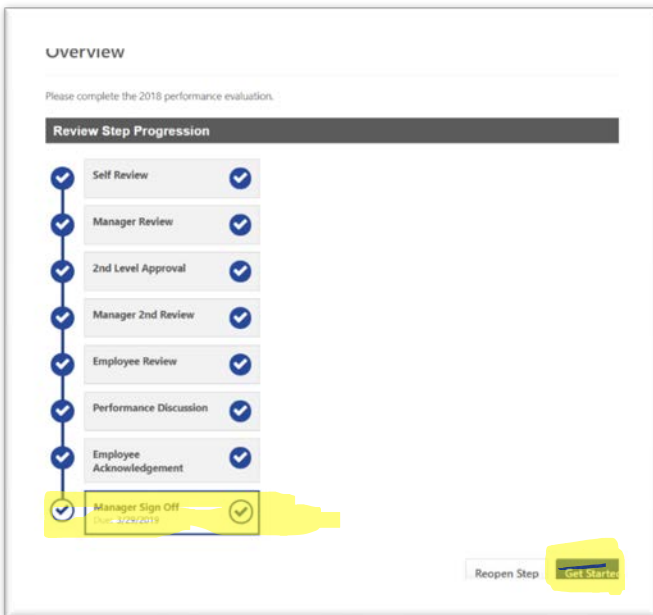
The screenshot shows the 'Overview' page with the instruction 'Please complete the 2018 performance evaluation.' Below this is a 'Review Step Progression' section. It features a vertical list of steps, each with a checkmark in a circle to its left and a checkmark in a box to its right. The steps are: Self Review, Manager Review, 2nd Level Approval, Manager 2nd Review, Employee Review, Performance Discussion (Due: 3/15/2019), Employee Acknowledgement, and Manager Sign Off. At the bottom, there are two buttons: 'Reopen Step' and 'Get Started'.

The screenshot shows the 'Discussion Step' form. It starts with the instruction 'You may add any pertinent comments regarding the discussion.' Below this is a text area containing 'Did you review/discuss the evaluation and ratings with the employee?'. Underneath is a dropdown menu with 'Yes' selected. Below the dropdown is another text area with the instruction 'Feel free to add any pertinent comments regarding the discussion:'. This is followed by a rich text editor with a toolbar and a text area containing 'Test'. At the bottom, there are four buttons: 'Back', 'Save and Exit', 'Save and Continue', and 'Submit'.

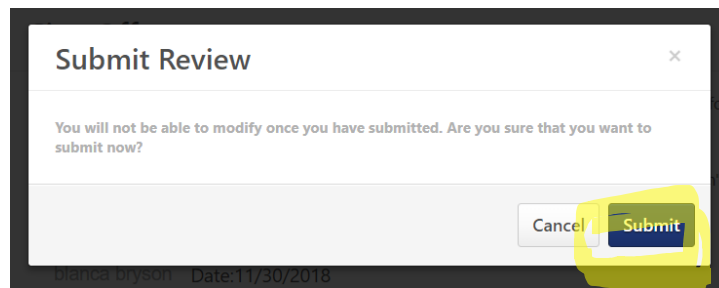
## Manager Sign Off > Get Started

After the Employee Acknowledges (Signs off) the Review, the Manager will review any additional comments made by the employee and then sign off > **Sign** and **Submit**.

**Once the Performance Review is submitted, it cannot be reopened.**



**This step will complete the review**



## To view completed Performance Reviews

Performance > **Performance Reviews** - Select "Show completed and expired tasks" > **Search**

Title:

Show completed and expired tasks

Title	Description	Status	Start Date	Due Date
Complete Goal Progress and Planning	Executive staff performance evaluation	In Progress	10/18/2018	2/15/2019
Complete Goal Progress and Planning	Performance evaluation with indirect manager	Not Started	11/29/2018	2/15/2019
Complete Manager Review of Blanca Bryson	2018 Executive Performance Plan	In Progress	10/30/2018	12/29/2018
Complete Manager Review of Blanca Bryson	Performance evaluation with indirect manager	Completed	11/29/2018	3/29/2019