



VCU employee's home for learning, performance management, and career development.

First Year Progress Review: Manager Instructions

Overview	2
Help Resources	3
Log-in and Welcome Page	4
Review Instructions	5
Sign Off Instructions	10
How to Access Completed Reviews	12

First Year Progress Review Overview

The first year progress review is an opportunity for managers and employees to have a formal check-in during the one year mandatory probationary period. The first year progress review contains the following steps:

1. The manager and new employee review and discuss the position, expectations, and performance goals—this includes 3 first-year (probationary) goals to be entered in Talent@VCU. One standardized goal applicable to ALL new university employees and one to two additional job-specific SMART goals. Below is the text of VCU's standard first-year goal:

Throughout my first year, I will integrate and familiarize myself with the VCU community, its strategic plan, VCU's culture of diversity and inclusion, university and department policies and procedures, and my position expectations and standards. I will actively and regularly engage in discussion with my manager and management team about positional and personal expectations and milestones.

2. After the discussion, the new **employee** should enter these goals into Talent@VCU and submit them for manager approval.
3. The **manager** will then receive an email notifying them the goals are awaiting manager approval; log into Talent@VCU to approve the goals.
4. Throughout the year, the employee will update their progress on goals in Talent@VCU.
5. At the 6 month mark, managers will complete the employee's six-month progress review in Talent@VCU.

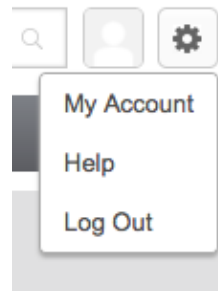
Talent@VCU tips for a successful first year progress review:

1. Update your goal progress. This includes:
 - a. Percent complete
 - b. Goal comments
 - c. Attachments
 - d. Tasks
2. Manager should open the Competencies Overview page in a new screen before starting the review task.

Talent @VCU

Help Resources

- Talent@VCU Instructional Materials
- Online Help

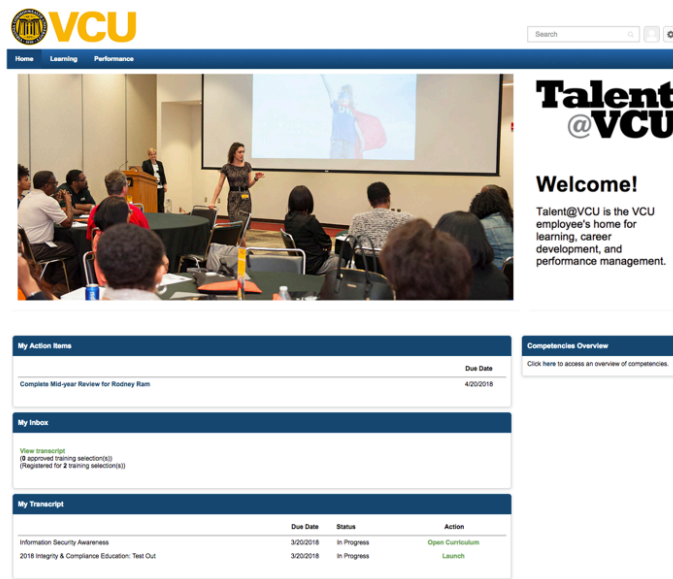


- Your Human Resources Professional/Consultant
- VCU IT Service Desk
<https://servicedesk.vcu.edu/>
select Talent@VCU

HOW TO SIGN IN AND WELCOME PAGE NAVIGATION

1. Type URL <http://go.vcu.edu/talentatvcu>
2. Type your VCU eID and password to sign in

Home Page: Talent@VCU Welcome Page




The **Home, Learning, and Performance** tabs allow you to navigate to different pages in Talent@VCU.

NOTE: please **hover** your cursor over the tabs and then click one of the options from the dropdown menu to navigate to that page.

My Action Items, My Inbox, and My Transcript notify you of upcoming performance and learning-related events and tasks.

The **Competencies Overview** is where you can find the University's Core and Leadership Competencies.

To navigate back to the home page, click 

FIRST YEAR PROGRESS REVIEW INSTRUCTIONS

- 1) To open the first year progress review for a selected employee, scroll down to My Action Items and **click** "Please complete first year progress review 6-month check in for X"

My Action Items	
	Due Date
Please complete first year progress review 6-month check-in for Jane Doe	7/27/2018

First Year Progress Review Overview Page

On this page, you'll find

- The review step progression can be found in the middle of the screen. Each time you are prompted to take action in a review, this screen will show you the current step in that process.
- The overview graphic on the left side of the screen shows you what sections of the review you need to complete in this step.

- 2) Please read all the instructions on this page carefully.
- 3) To start the review, click Get Started.

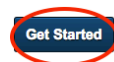
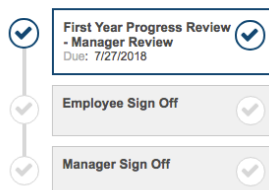
Overview

The first year progress review 6-month check-in is an opportunity for managers and employees to have a formal check-in and document progress during the employee's probationary year. The review includes the following sections to be completed by both the employee and the manager:

1. A narrative progress update on each of the employee's SMART goals.
2. Comments to support demonstration of the core and leadership (if applicable) competency behaviors in the achievement of the SMART goals.
3. A comprehensive rating (using the 3-option performance ratings scale), which includes consideration for both goal progress and competency behaviors.


Each employee will be required to complete a self-review before their manager completes the review. Once the manager has completed the review, the manager and employee will meet to discuss its contents and set performance expectations for the remainder of the year. The final step of the mid-year review occurs when the manager and then the employee sign-off on the review in Talent@VCU.

Review Step Progression




First Year Progress Review - Goal Update

- 4) Read the instructions at the top of the page.
- 5) Use the comment boxes to provide updates on **each** of the goals.

NOTE: To access the goal comments and attachments, **click** the  options button.

First Year Progress Review - Goal Update

Please provide an update on Jane Doe's progress for each SMART goal. You may use information from previous goal comments and updates made in Talent@VCU including percent complete, tasks, and attachments.










SMART GOAL 









Progress: **0%**

Start Date: 1/1/2018
Due Date: 12/31/2018
more...

Weight: %

Comments:

B I U S x₂ x² I_x |  |  |  |  |  |  |  | Font Size  

Enter Goals Comments Here

- 6) After all goals are updated, move to the next section of the review. If you want to save your progress, exit the review, and finish it another time, **click** "Save and Exit."
If you are ready to move to the next page of the review, **click** "Save and Continue."

Back

Save and Exit

Save and Continue

Mid-year Competency Review Page

- 7) Read the instructions at the top of the page.
- 8) Answer both questions below by entering your responses in the text/comment boxes.

Areas of strength:

Comments: *

B *I* U ~~S~~ x_2 x^2 *I_x* Font Size **A** **A**

ABC

Enter text here.

Opportunities for growth:

Comments: *

B *I* U ~~S~~ x_2 x^2 *I_x* Font Size **A** **A**

ABC

- 9) After you have finished entering comments, please proceed to the next section of the review.
If you want to save your progress, exit the review, and finish it another time, **click** "Save and Exit."
If you are ready to move to the next page of the review, **click** "Save and Continue."

First Year Progress Review Extension Request

- If you need to extend the probationary period past 12 months, please type "yes" in the comment box.
- If no request is necessary, please write "n/a" in the comment box.
- If you have questions about probationary extensions, please contact Employee Relations at (804) 828-1510.
- **NOTE:** the employee will be able to see this portion of the review.

10) After you answer the probationary extension question, please move to the final section of the review.

If you want to save your progress, exit the review, and finish it another time, **click** "Save and Exit."

If you are ready to move to the next page of the review, **click** "Save and Continue."

First Year Progress Review Rating

- 11) Read the instructions at the top of the page.
- 12) Use the drop down menu to select a rating.

NOTE: To locate the ratings scale definitions, click on the circular "?" button.

First Year Progress Review Rating

Please read the definitions for each rating. Consider both progress toward goals and demonstration of competency behaviors, then select the most appropriate rating aligned with Employee.Name's performance.

Use the comment box to share information to support your rating.

First Year Progress Review Rating

Select ?

- ✓ Select
- Below
- Needs Improvement
- Successful

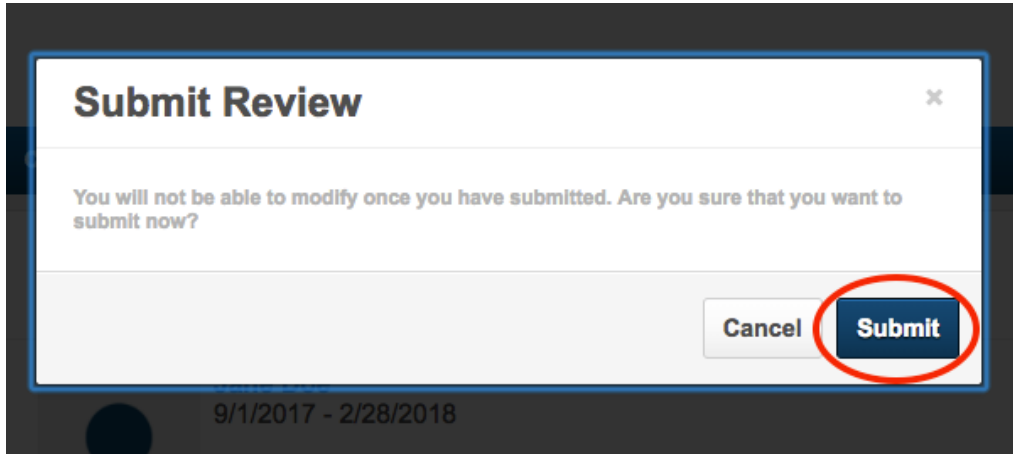
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Back Save and Exit **Submit**

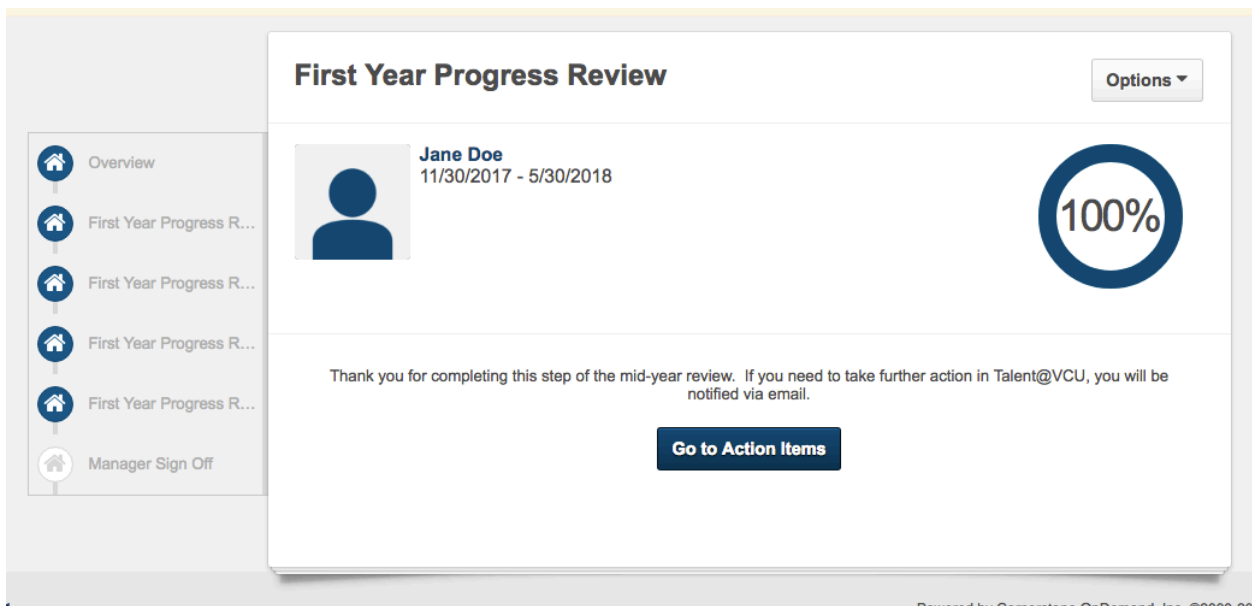
- 13) When the review is complete, **click** “Submit”.
If you want to save your progress, exit the review, and finish it another time, **click** “Save and Exit.”

NOTE: As soon as you submit your review, the employee will receive a notification that it is ready for them to view.

- 13) **Click** “Submit”.



- 14) When submission is complete, you will be redirected to the confirmation page.



MANAGER SIGN-OFF

Notes about sign-off:

- An in-person conversation discussing the results of the review must take place before either the manager or employee can sign off on the review in Talent@VCU.

1) To open the first year progress review for a selected employee, scroll down to My Action Items and **click** "Please complete first year progress review 6-month check in for X"

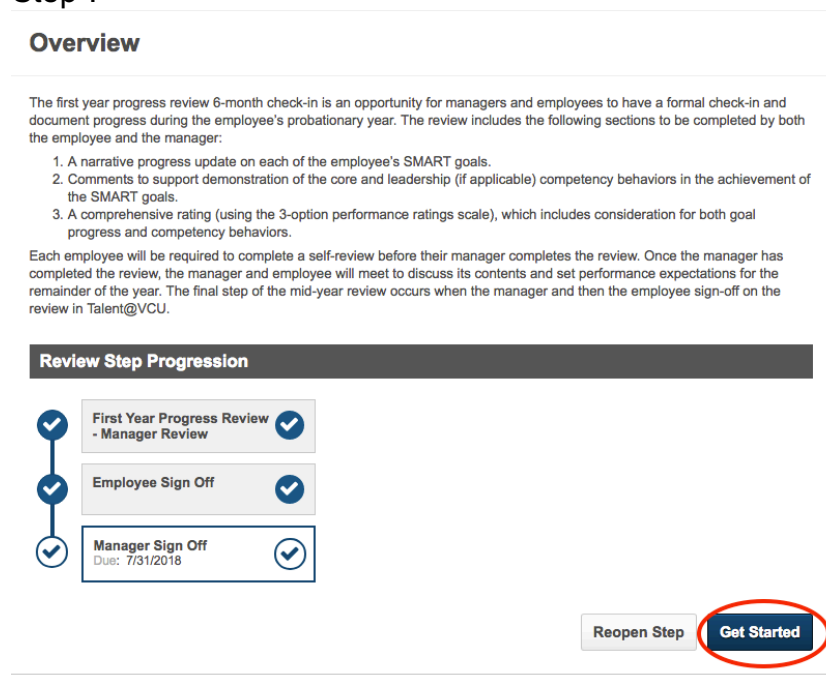


My Action Items	
	Due Date
Please complete first year progress review 6-month check-in for Jane Doe	7/31/2018

First Year Progress Review Overview Page

- 1) Please read all the instructions on this page carefully.
- 2) To start the review, click "Get Started".

NOTE: If for some reason, you need to make changes to the review, **click** "Reopen Step".



Overview

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Review Step Progression

- First Year Progress Review - Manager Review
- Employee Sign Off
- Manager Sign Off
Due: 7/31/2018

Reopen Step **Get Started**

- 3) Click “next” to move through each page of the review (goals, competencies, comprehensive rating).

Sign-off Page

- 4) Type your name in the box and **click** “Sign”.
- 5) Use the comment box to add any additional comments about the performance discussion.
- 6) **Click** “Submit”.

Mid-year Review Manager Sign-off

Please sign-off on the mid-year review. By signing off you verify that you and your employee have had an in-person conversation to discuss the contents of their mid-year review and have set clear performance expectations for the remainder of the performance cycle.

Manager

Lisa Jackson

Sign

Comment

B I U S I_x | | | | |

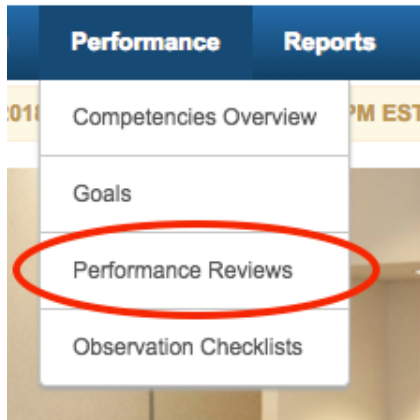
Jane and I had a great conversation about all the good work she is doing at VCU. I look forward to seeing what the results of all her hard work at the end of the year.

Back **Save and Exit** **Submit**

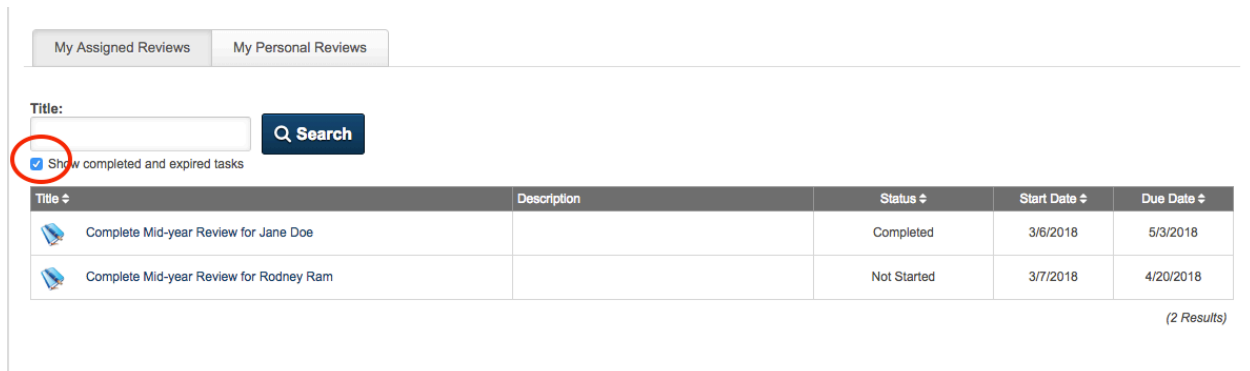
- 7) **Click** “submit” on the pop-up window.
- 8) When submission is complete, you will be redirected to the confirmation page.

INSTRUCTIONS TO ACCESS COMPLETED REVIEWS

- 1) To open the review, **hover** your cursor over the Performance tab and **click** on “Performance Reviews”.



- 2) Under “My Assigned Reviews” make sure the option to show completed and expired tasks is checked.
- 3) Select the review by **clicking** on the review name.



My Assigned Reviews My Personal Reviews

Title:

Show completed and expired tasks

Title	Description	Status	Start Date	Due Date
Complete Mid-year Review for Jane Doe		Completed	3/6/2018	5/3/2018
Complete Mid-year Review for Rodney Ram		Not Started	3/7/2018	4/20/2018

(2 Results)