UR TALENT WEB – YEAR END REVIEW TIP SHEET - SUPERVISORS

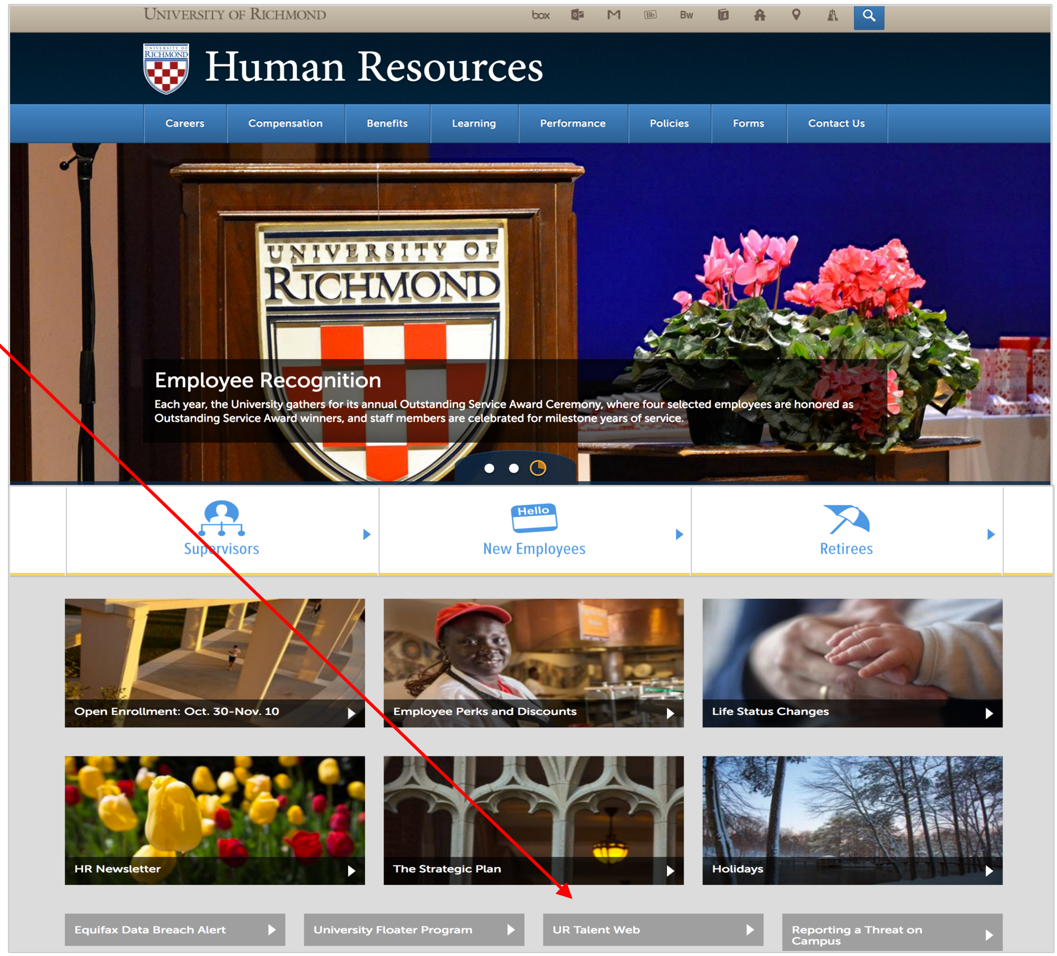
UR Talent Web Log In Steps

1. Log into UR Talent Web from HR homepage – see picture and red arrow.

Note - PC users, recommended browser is Internet Explorer) – https://richmond.csod.com/samldefault.aspx

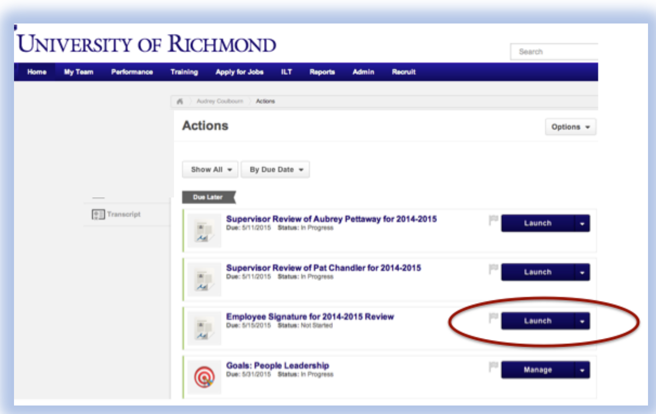
2. Input User ID (your NETID - is used to log onto the University of Richmond network (i.e. sjones5)

3. Input password – your network password.



WRITE A PERFORMANCE REVIEW

1. The first screen is the "My Profile" page. A list of your pending actions will appear in the Actions list. You will see a task to complete the "Supervisor Review" for each of your direct reports. Employees hired on or after March 1st will not show up in your list, as they are "Too new to Rate". Click on "Launch" to start the first review.



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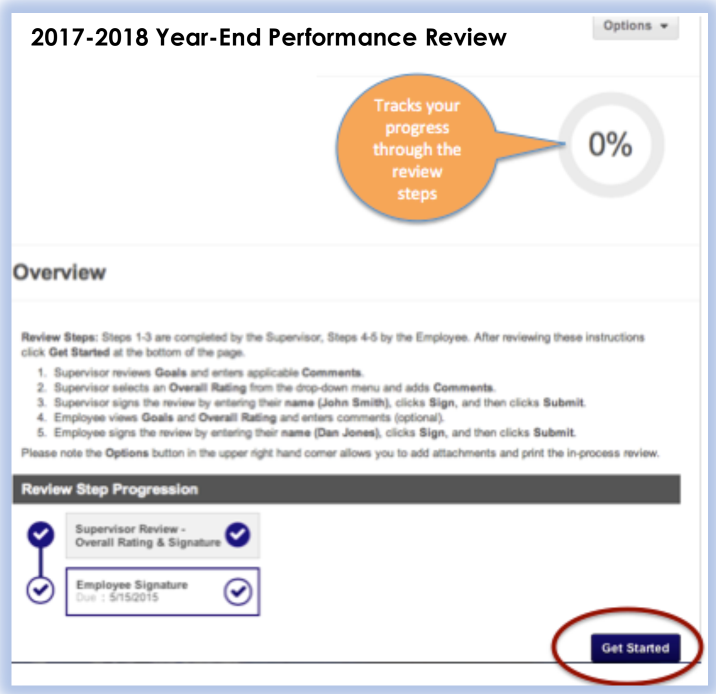
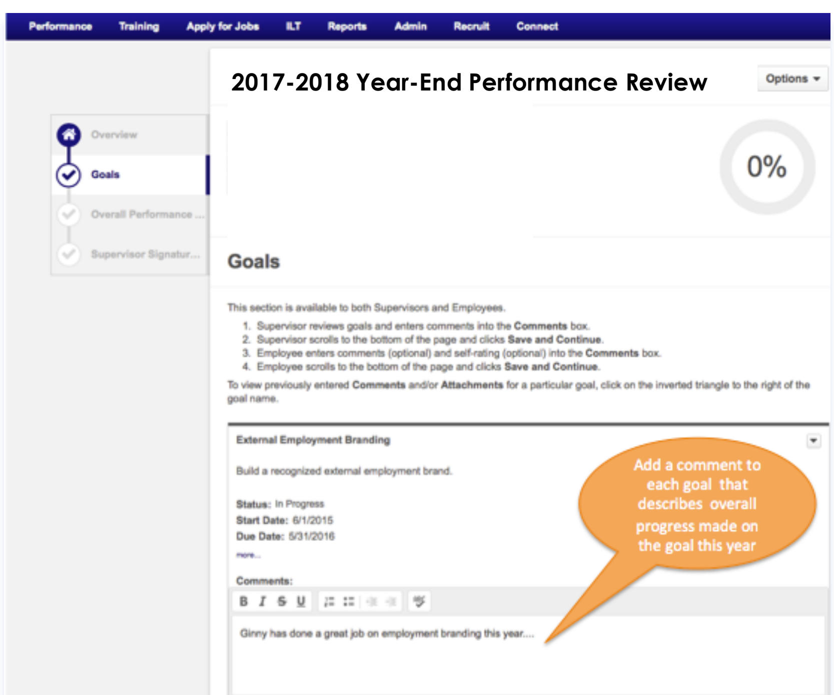
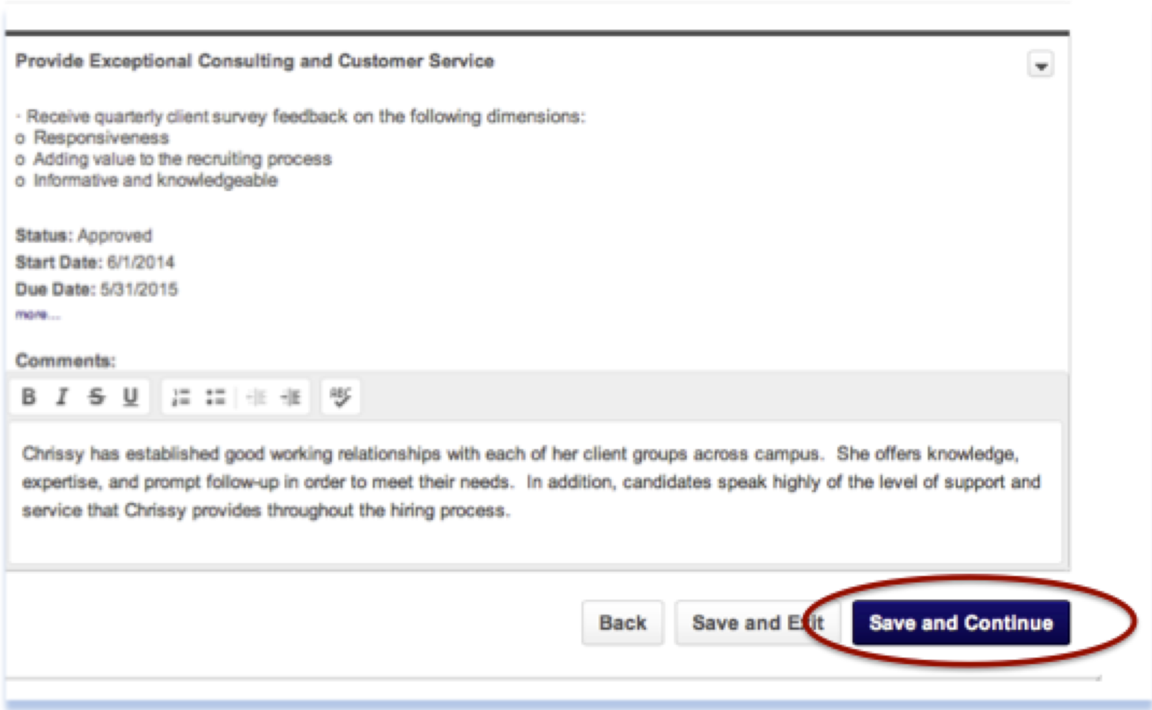


2. Read the Overview instructions. To complete the review, you will review each goal, include comments (optional), select an overall performance rating from the drop-down menu, add overall comments, sign and submit. At any time, you can click on "Options" to add an attachment or print the review. Click "Get Started" to begin the review.

3. Scroll through the next screen to see your employee's goals. You will only see goals for the 2017-18 performance year (6/1/17-5/31/18). Add a comment to each goal that provides information on how the employee has progressed toward the goal over the performance year. Adding comments is not required, but strongly recommended!



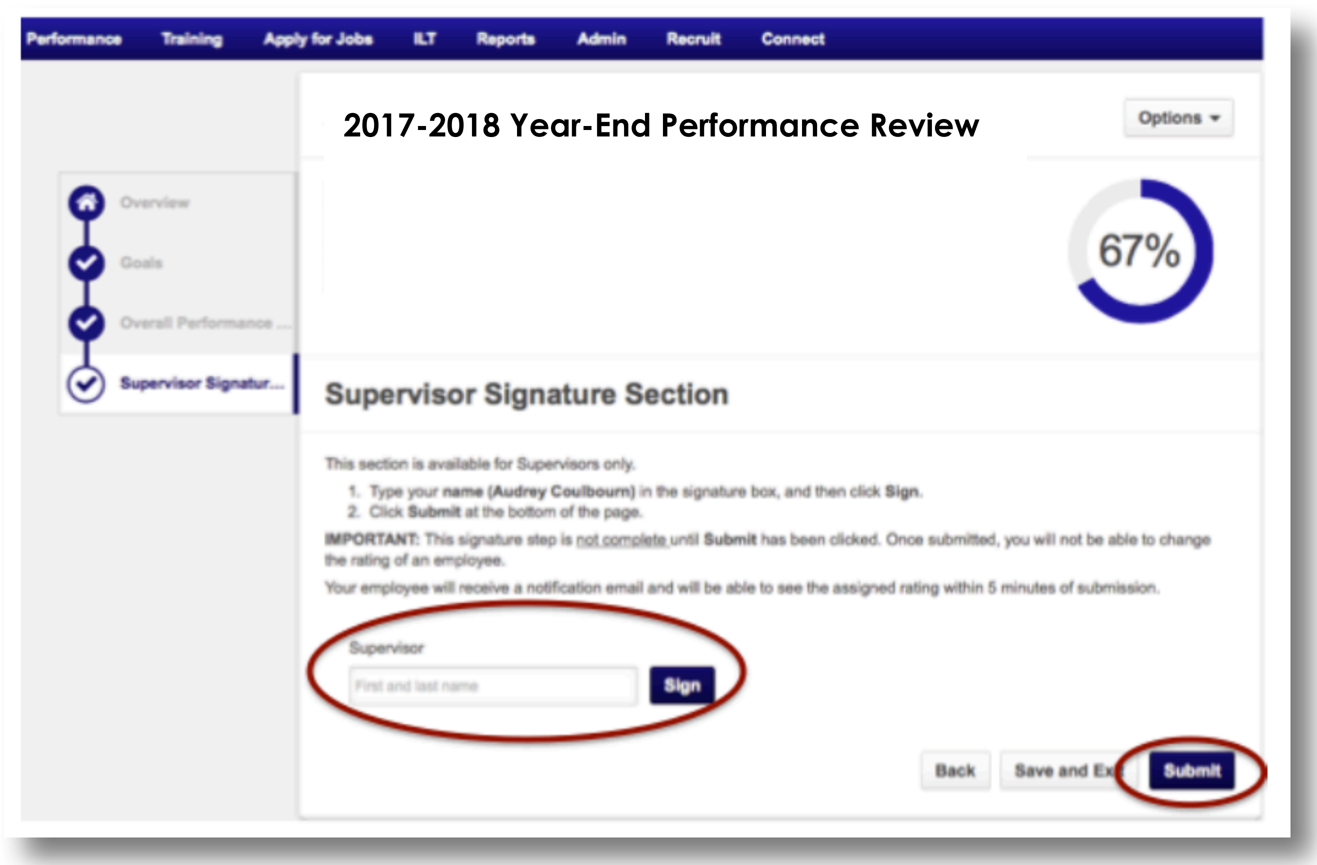
4. When you have reviewed the goals and completed comments, scroll to the bottom of the page to click "Save and Continue". At any time, you can click "Back" to go back a page or "Save and Exit" to save your work and come back to it later.



5. Select an overall performance rating for your employee.

The overall rating should reflect the performance against their goals for the year. Include comments in the comments box that provide your rationale for the rating. Click "Save and Continue". **You must select a performance rating in order to complete the review.**

6. Type your name in the signature box. **Click "Sign" then click "Submit"**. **The review is not complete until you click "Sign" and "Submit". Once you sign and submit, the review will disappear from your Actions list and will show up in your employee's Action list to review, sign and submit. The process is not complete until the employee reviews, signs, and submits.**



FREQUENTLY ASK QUESTIONS

1. Who should be reviewed?

All full and part-time staff employees who are eligible for merit pay receive a performance review and overall performance rating. Those who are not eligible for merit pay and do not receive an overall rating are:

- Full or part-time employees **hired on or after March 1st of the performance year**
- Temporary employees (short-term or casual)
- Independent contractors
- Limited term employees (including grant funded positions)
- Retirees

Employees, who transfer from one department to another during the performance year, should receive a review, overall rating, and merit pay (see question #3).

2. I don't have the correct employees showing up in my Actions list, what do I do?

If your employees are missing or incorrect in UR Talent Web, please send an email to URHR@richmond.edu with the names of the employees who should be included on your team so that the information can be updated in Banner.

3. What if an employee transferred to my department during the year?

The employee should be evaluated based on their performance for the year, both within your department and the department he/she transferred from. Contact the employee's previous supervisor and ask that he/she provide comments on the employee's performance for the time period worked in the previous department. This can be done in a Word document and then attached to the performance review in Talent Web (see question #2 above). The overall performance rating should reflect the accomplishments achieved in both departments.

4. What if an employee has a dotted line reporting relationship to another supervisor?

Contact the dotted line supervisor and ask that he/she provide comments in a Word document on the employee's performance and accomplishments for the year. Attach the document to the performance review in Talent Web (see question #2 above).

5. What if I can't see the navigation across the bottom of the review?

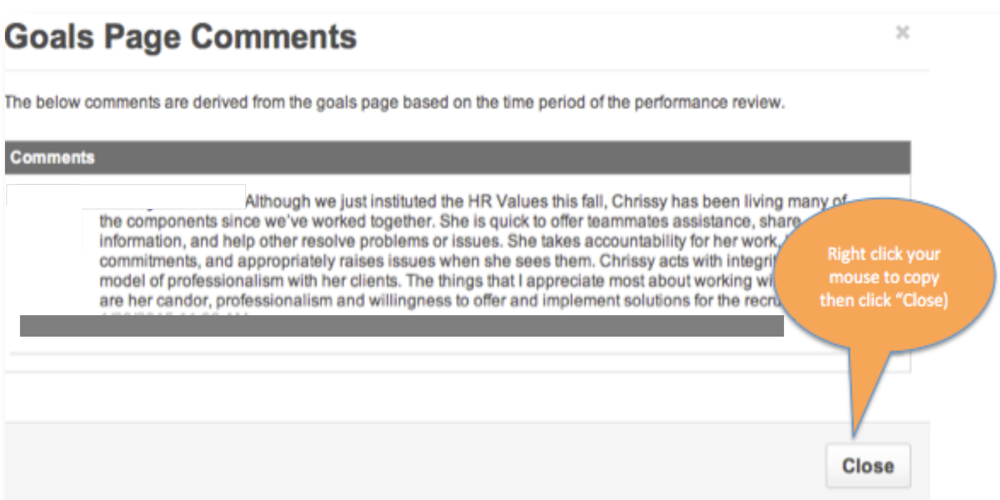
In order to make sure you can see the navigation options on the bottom of the review pages, go to your computer tool bar at the top of your screen. Click "View", and then click "Full Screen".

FREQUENTLY ASK QUESTIONS

6. How can I see comments or an attachment that I added to the goals earlier in the year?

Click on the upside-down triangle next to the goal. Choose either "Goals Page Comments" of "Goals Page Attachments".

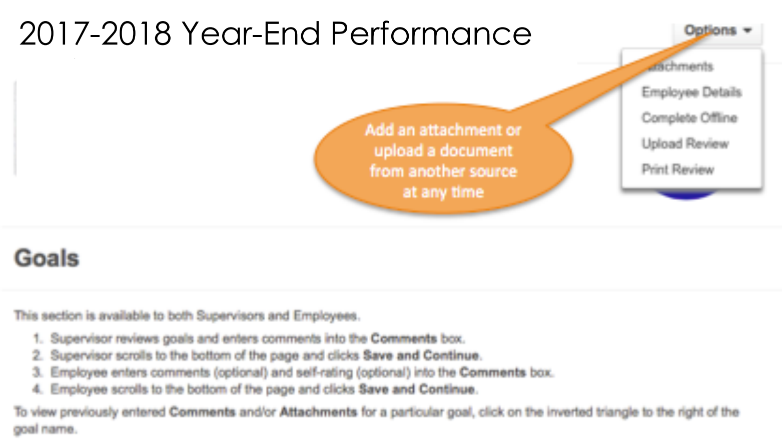
A pop up box with previously written comments or your attachment will appear. If you want to copy and paste these comments into the performance review, right click with your mouse, choose "Copy". Click "Close" to get back to the performance review and goal. Right click with your mouse and choose "Paste" to paste the comment into the goal comments section.



FREQUENTLY ASK QUESTIONS

7. I wrote a performance review in a Word document, how can I upload or attach it?

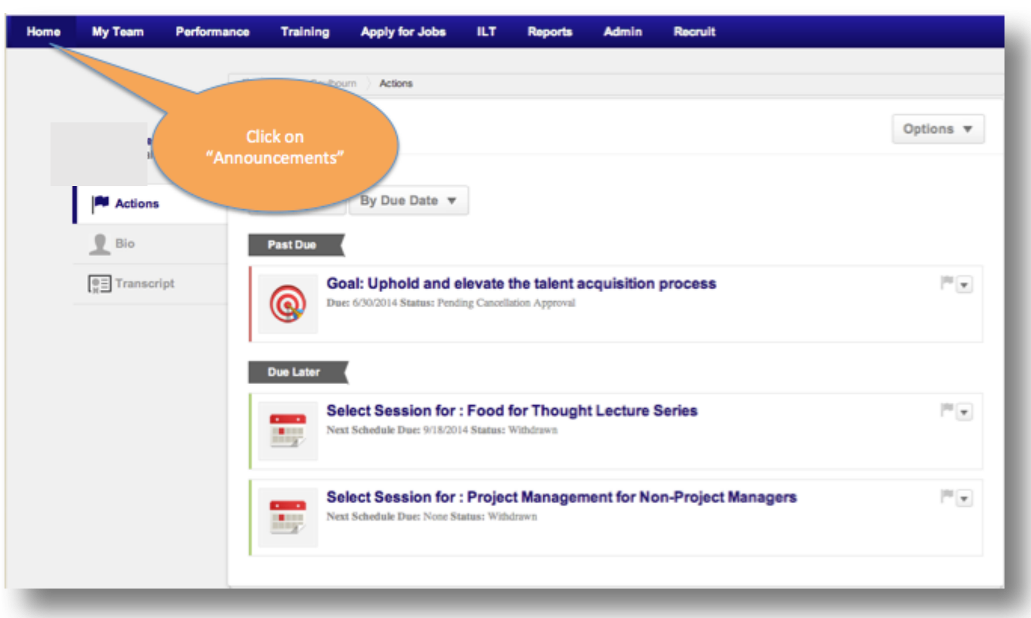
On each page of the performance review, there is an "Options" box in the upper right hand corner. Click on "Options" and select "Attachment".



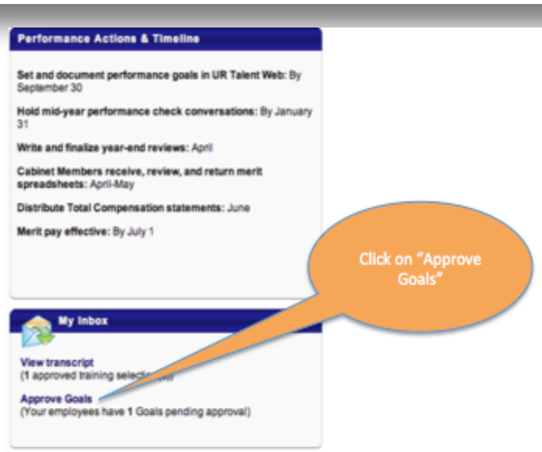
YOU WILL BE PROMPTED TO UPLOAD THE ATTACHMENT FROM YOUR FILES. CLICK "FILE"; SELECT THE FILE, AND THEN SELECT "SAVE". YOU WILL STILL NEED TO CHOOSE AN OVERALL PERFORMANCE RATING IN THE REVIEW, SIGN, AND SUBMIT IN ORDER TO COMPLETE THE REVIEW PROCESS.

8. What if there are no goals in the review?

If there are no goals in the review, either the employee didn't write goals or you have not approved them. Check to see if you have goals to approve. From the Actions list, click on "Home" in the upper left hand corner of the screen. Select "Announcements" from the drop-down menu.



FREQUENTLY ASK QUESTIONS



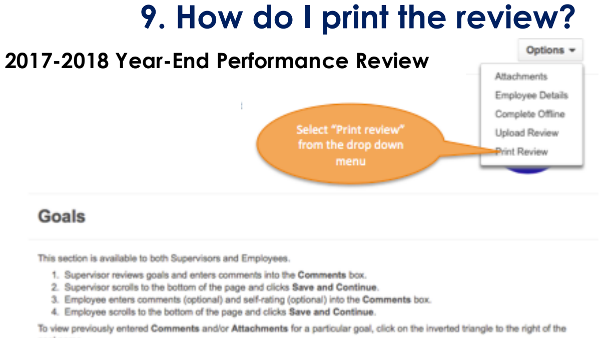
If you have goals to approve, you will have a message in your "Inbox" to approve the goals. Click "Approve Goals". Once approved, the goals should appear immediately in the performance review.

If there is not a message to approve goals:

1. Ask your employee if they have written and submitted the goals in the system. If the employee has submitted the goals and you still do not have a message to approve and you cannot see them, contact HR at URHR@richmond.edu for help troubleshooting the issue.

2. If the employee has not written and submitted goals in the system, they will need to do so in order for goals to show up in the performance review. Once they've written and submitted them, you will need to follow the steps above to approve the goals. Once approved, they will show up in the performance review.

9. How do I print the review?

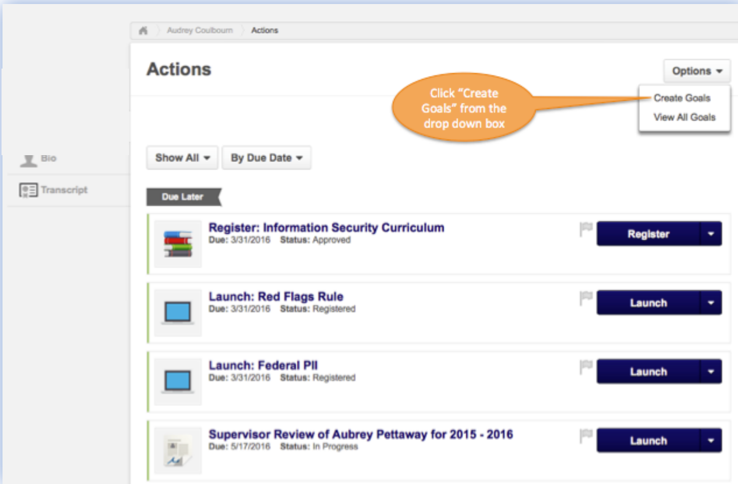


On any page of the review, click "Options" in the upper right hand corner. Select "Print Review" from the drop-down menu.

The review will appear, then click "file", "print" from your tool menu at the top of your computer screen

FREQUENTLY ASK QUESTIONS

10. What if I want my employees to create goals for 2018-19?



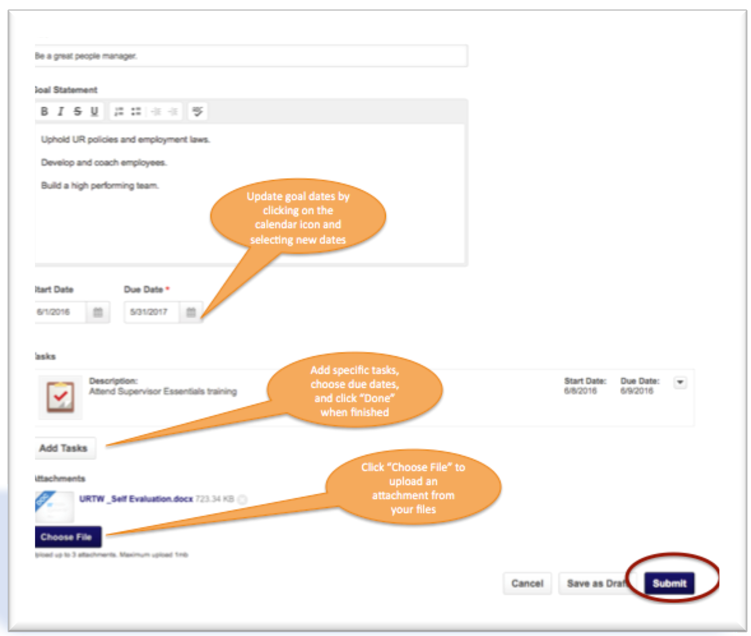
Employees will need to go to their Actions page. Click on "Create Goals" in the drop-down box under "Options" in the upper right hand corner of the Actions page. This will take them directly to the page to create a new goal.

A blank goal page will open.

Write a SMART Goal:

1. Write the title of the goal, for example "Be a great people manager."

2. In the Goal Statement section, write a description of the goal. For example,
"Uphold UR policies and employment laws, Develop and Coach Employees, and Build a High Performing Team."



3. You can update the dates by clicking on the calendar icon next to the start date and due dates.

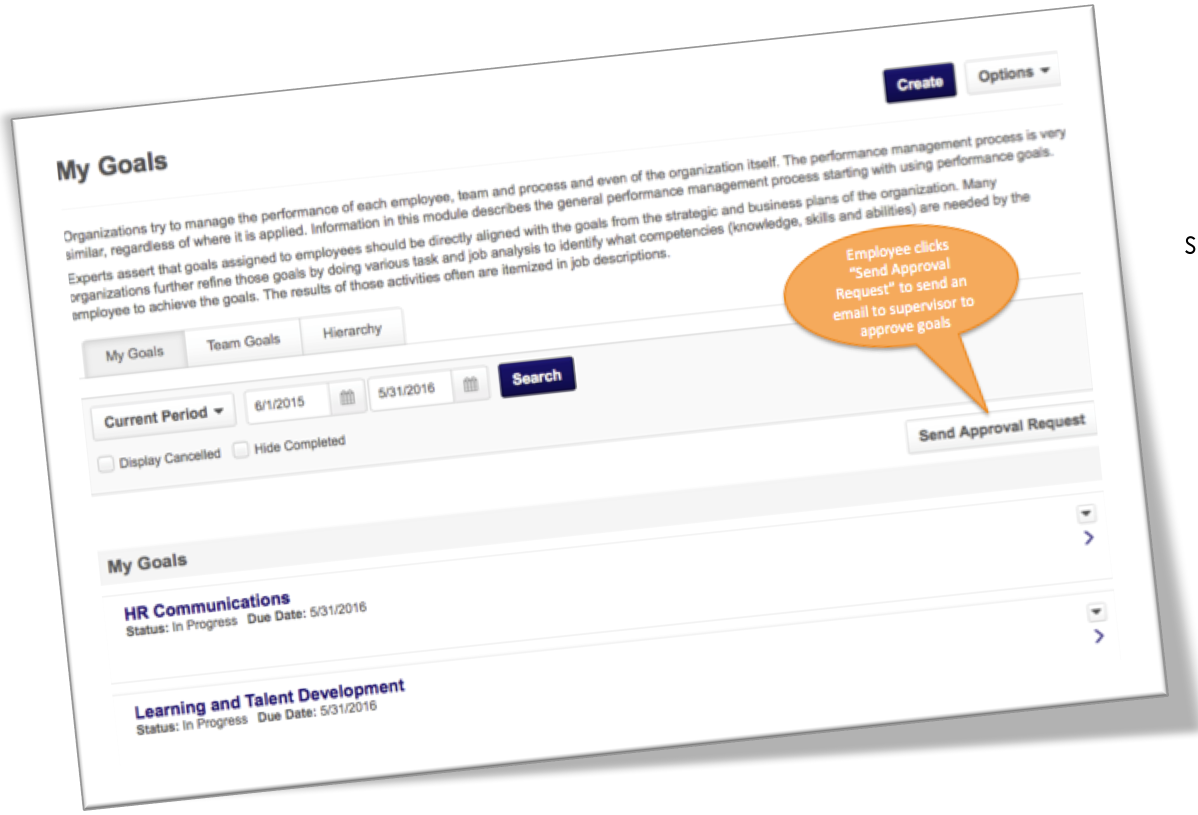
4. Add specific measurable tasks by clicking on the "Add Tasks" button. For example, "Receive 98% satisfaction ratings on customer surveys" or "Respond to all customer requests within 48 hours". If you add tasks, be sure to include the due dates using the calendar icon and click "Done".

5. If you would like to add an attachment, click on the "Choose File" button under the word "Attachments" and follow the prompts to upload a document from your files.

6. When you have finished writing the goal, click "Submit".

FREQUENTLY ASK QUESTIONS

New goals will not appear in the Actions list until the Supervisor has approved them. You can view them in your Goals section-they will be listed as "Approval Pending".



Once the goal has been written, employees should go back to his/her list of goals, and click "Send Approval Request", which will send an automated email to the supervisor so that the goals can be approved.