

# Completing the Performance Management Process - Leaders

This SOP gives step-by-step instructions of how to complete the performance management process as a leader, including calibration. This should be accurate for all fiscal years for annual performance reviews.

42 Steps [View most recent version](#) 

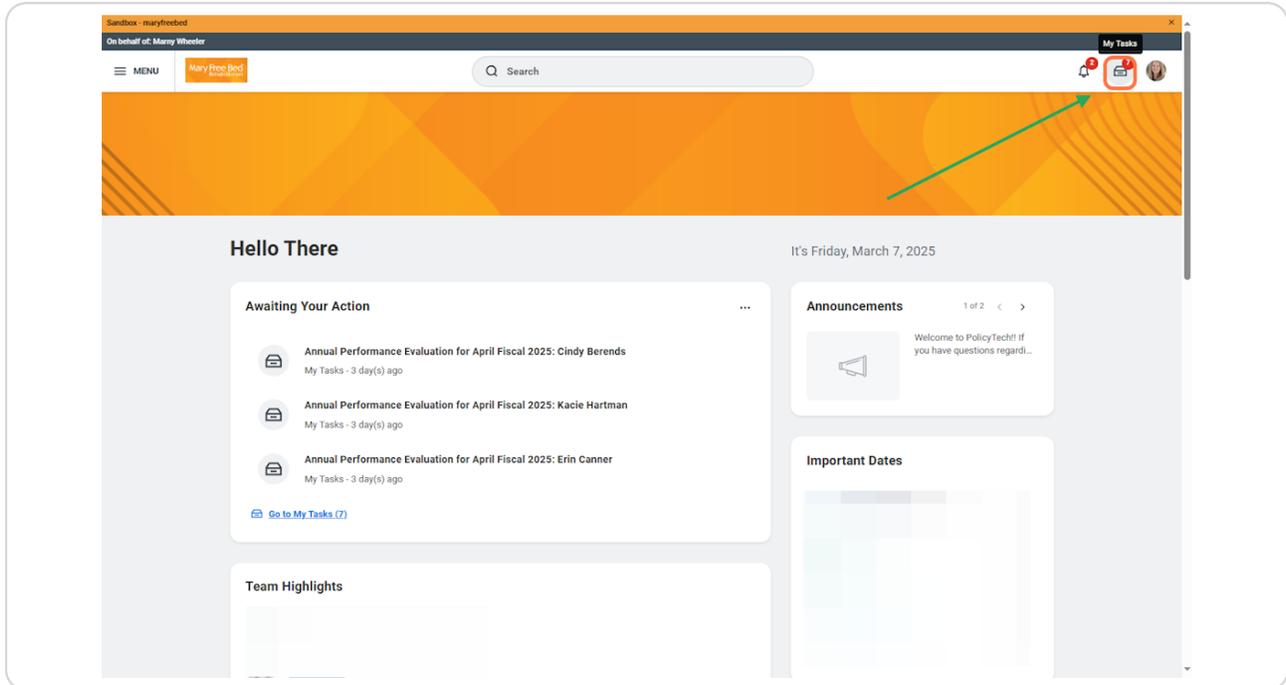
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Created by	Creation Date	Last Updated
Alex Drabik	Mar 07, 2025	Mar 18, 2025

## STEP 1

### Click on "my tasks" in top right-hand corner to view inbox

Once Human Resources has launched the Performance Management process, tasks will show up in a leader's inbox. You can also view by going to Menu - Team Performance - Employee Reviews to see a full list of the reviews assigned to you. \*\*\*\*\*



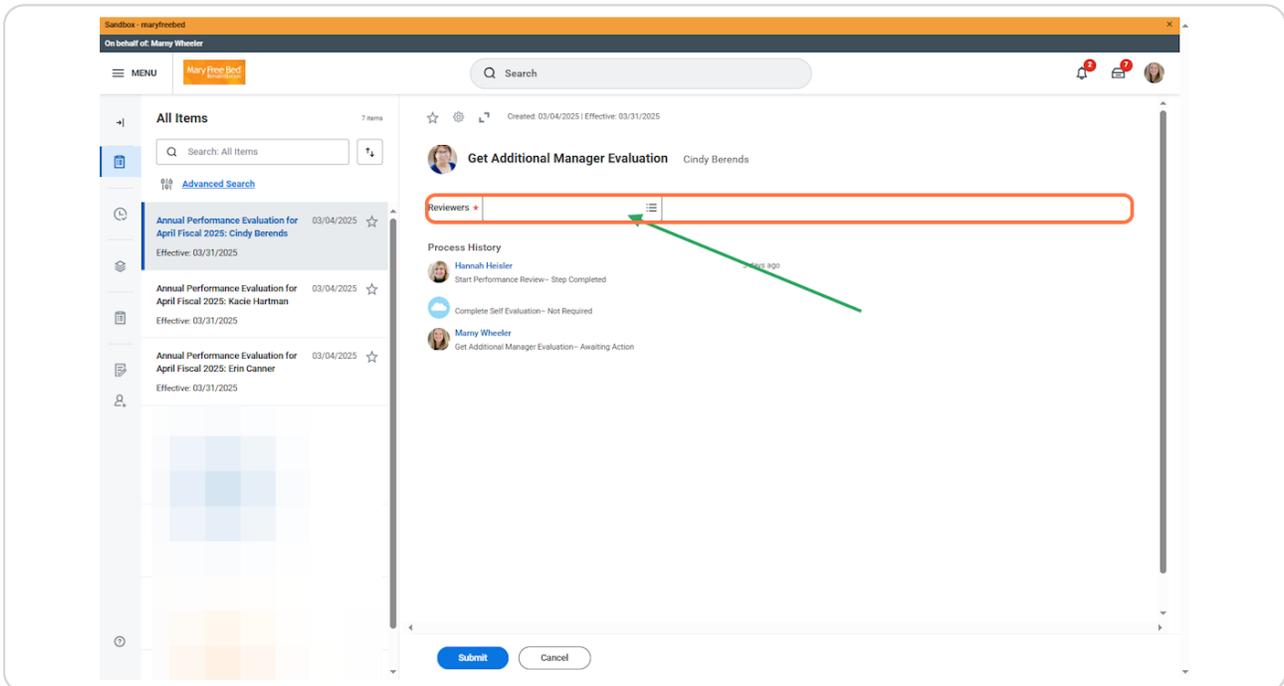
## STEP 2

### **OPTIONAL STEP: Leaders can add in additional contributors to complete reviews if wanted. Click on review box to add name. \*If you don't want to add, skip to step 7\***

Additional contributors should be used for situations of gaining additional insight into an employee's performance throughout the year. This should be mainly used for alternate leaders or team leads/dotted line supervisory roles for the employee. They will only be able to add comments, not fully score the individual.

Additional contributors need to do their review BEFORE the direct manager completes their review.

These comments WILL be seen by the employee and on their review. Please be cognizant of anything you are putting on employee's reviews. All information is visible to the employee.



### STEP 3

**OPTIONAL STEP: Type in name of employee in box, select the appropriate name.**

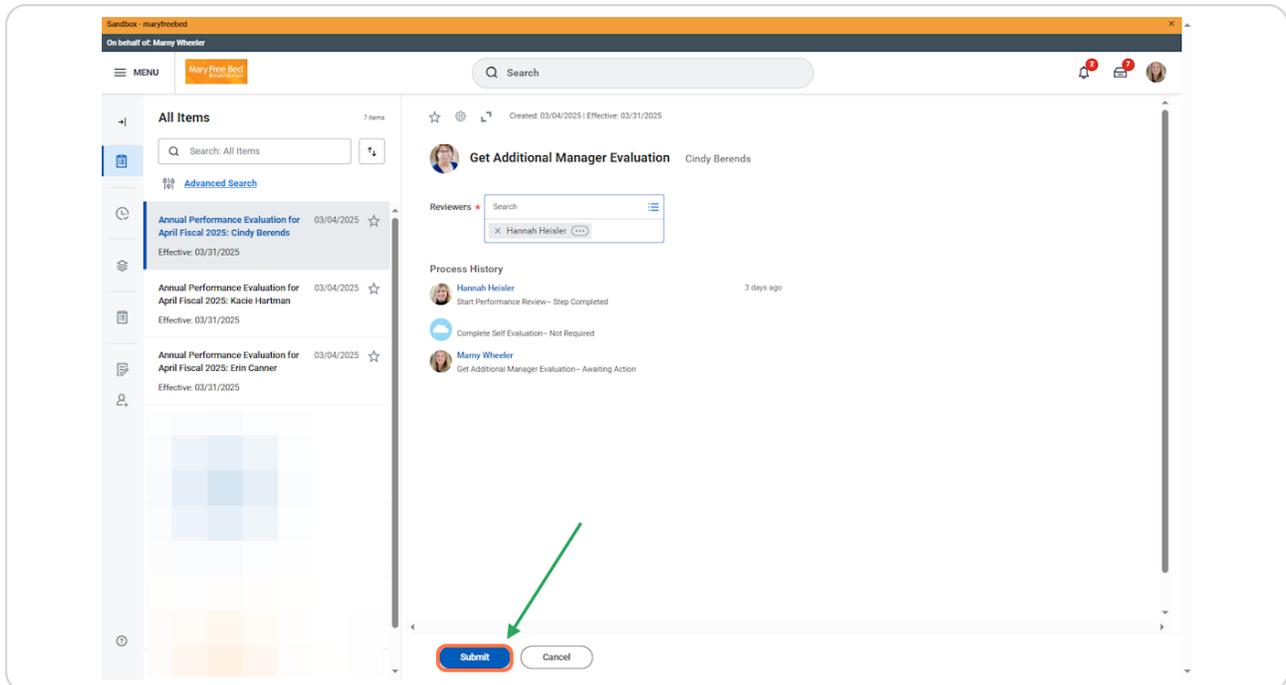
The screenshot displays a web interface for a performance evaluation system. At the top, the name 'Wheeler' is visible in the header. Below the header, there is a search bar with the text 'Search'. The main content area is divided into two columns. The left column, titled 'Items', shows a list of performance evaluations for 'Cindy Berends' for the fiscal year 2025. The right column, titled 'Get Additional Manager Evaluation', shows the current step in the process. A red box highlights a search input field within the 'Reviewers' section, with a green arrow pointing to it. The search field contains the text 'Search' and a dropdown menu showing 'Hannah Heisler'. Below the search field, there is a 'Process History' section with a list of steps: 'Start Performance Review - Step Completed', 'Complete Self Evaluation - Not Required', and 'Get Additional Manager Evaluation - Awaiting Action'.

## STEP 4

### OPTIONAL STEP: Click on Submit to send this review to the additional contributor.

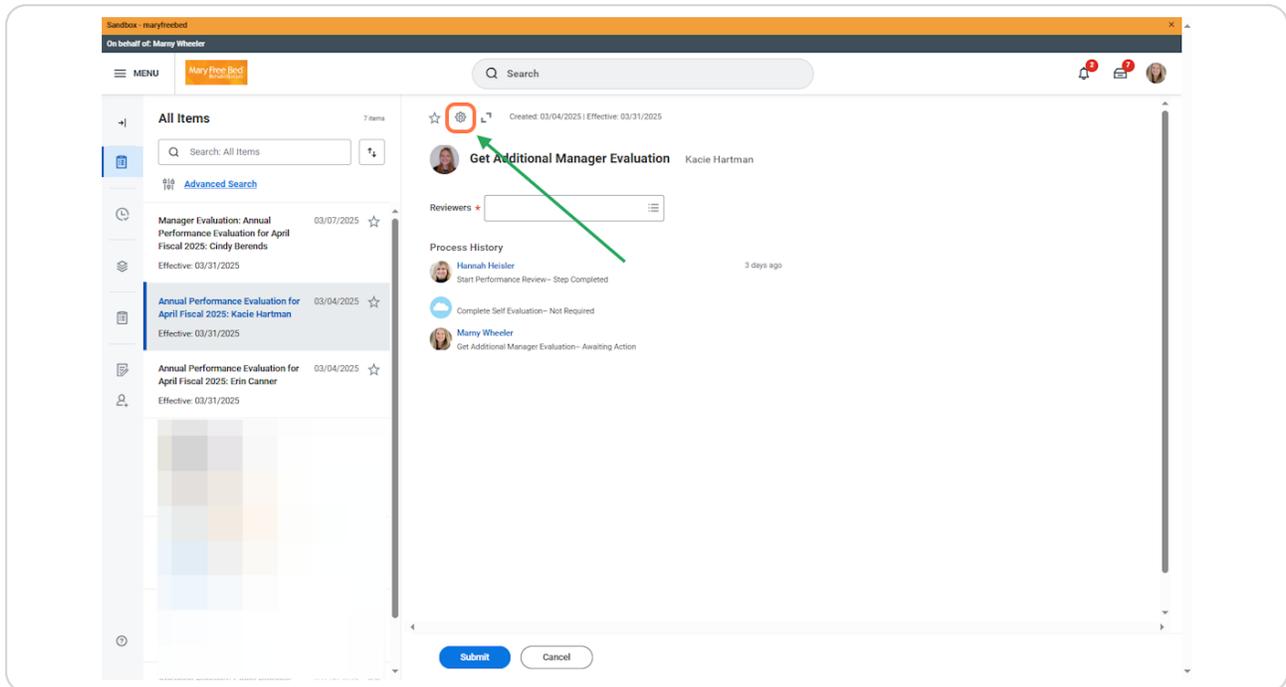
Additional contributors need to do their review BEFORE the direct manager completes their review.

These comments WILL be seen by the employee and on their review. Please be cognizant of anything you are putting on employee's reviews. All information is visible to the employee.



## STEP 5

**SKIP STEP FOR ALTERNATE CONTRIBUTOR:** If there is no alternate contributor needed for an employee, you can "skip this task" by selecting the gear button called Task Actions for the applicable employee



## STEP 6

Click on Skip This Task and then click on "OK" to bypass the additional contributor step for the employee.

The screenshot shows a web application interface for performance evaluations. On the left, there is a sidebar with a search bar and a list of tasks. The main area displays a task titled "Additional Manager Evaluation" for Kacie Hartman, created on 03/04/2025 and effective from 03/31/2025. A context menu is open over the task, with the "Skip This Task" option highlighted in a red box. A green arrow points to this option. The "Process history" section shows three steps: "Start Performance Review - Step Completed" by Hannah Heisler, "Complete Self Evaluation - Not Required", and "Get Additional Manager Evaluation - Awaiting Action" by Marny Wheeler.

7 items

Search

Created: 03/04/2025 | Effective: 03/31/2025

Additional Manager Evaluation Kacie Hartman

Delegate Task

Reassign

Skip This Task

View Details

Process history

Hannah Heisler Start Performance Review - Step Completed 3 days ago

Complete Self Evaluation - Not Required

Marny Wheeler Get Additional Manager Evaluation - Awaiting Action

Annual Evaluation for April Andy Berends 03/07/2025

Performance Evaluation for 25: Kacie Hartman 03/04/2025

Performance Evaluation for 25: Erin Canner 03/04/2025

## STEP 7

**Manager Evaluation: a new task labeled "Manager Evaluation" will appear in your inbox, and the first page will show an overview of the scoring rubric for employees. You will scroll to the bottom of the screen and select "Get Started" to begin the review.**

**IMPORTANT DIFFERENCE BETWEEN TASK NAMES:**

Tasks labeled "Annual Performance Review" are on the 'Add Additional Contributor' step

Tasks labeled "Manager Evaluation" are on the 'Direct Manager review' step

The screenshot displays a user interface for a performance review system. On the left, a sidebar lists tasks under 'All Items'. The main content area shows a performance rubric with five levels: Low Solid Performer (2), High Solid Performers (3), High Performer (4), and Performance Leader (5). A blue 'Get Started' button is located at the bottom of the rubric section, with a green arrow pointing to it.

**Low Solid Performer (2) - Inconsistently meets performance expectations most of the time.**

- Employee inconsistently performs assigned duties, and job functions and competencies most of the time.
- Employee benefits from support and guidance by Supervisor.
- May be on a performance plan and/or disciplinary action.
- Employee most of the time demonstrates professionalism, respect and compassion when interacting with stakeholders.
- Employee inconsistently communicates with stakeholders.
- Employee inconsistently demonstrates our T.O.G.E.T.H.E.R. commitment in daily interactions with stakeholders.

**High Solid Performers (3) - Consistency meets performance expectations.**

- Employee performs and demonstrates majority of assigned duties and competencies consistently.
- Employee consistently adheres to behavior standards and climb to excellence tactics.
- Employee consistently achieves desired results and displays competencies in most or all job description areas and relied on attaining expected results in timely matter.
- Employee is capable and knowledgeable and may be assigned as a trainer/preceptor/mentor.
- Employee consistently demonstrates professionalism, respect and compassion when interacting with stakeholders, while recognizing others and showing compassion.
- Employee effectively communicates consistently using appropriate verbal and non-verbal communication. - Employee lives out our T.O.G.E.T.H.E.R. commitment in daily interactions with stakeholders.

**High Performer (4) - Consistently exceeding performance expectations.**

- Employee performs consistently beyond job description and competencies.
- Consistently improves processes and communication.
- Employee requires minimal supervision or follow-up from the Supervisor.
- Consistently maintain successful performance. - Employee almost always displays initiative.
- Employee is considered a fully qualified or highly experienced person in a position.
- Employee goes above and beyond to demonstrate exceptional professionalism, respect, and compassion for others, while showing compassion and empathy in every interaction.
- Employee always communicates in a positive and effective manner.
- Employee is an example for others in living out our T.O.G.E.T.H.E.R. commitment and looks for opportunities to expand efforts.

**Performance Leader (5) - Extraordinary performance**

- Employee goes above and beyond expectations, leads others to higher engagement, and better performance.
- Employee demonstrates extraordinary understanding of role and job competencies.
- Employee consistently displays excellence in alignment of initiatives that advance strategic plan.
- Employee performs independently in planning, anticipating problems and taking action.
- Employee demonstrates extraordinary professionalism, respect, and compassion for others, while showing compassion and empathy in every interaction.
- Employee is extraordinary at communicating with stakeholders, and focus on collaboration, safety, and quality of every interaction.
- Employee demonstrates living out our T.O.G.E.T.H.E.R. commitment daily.

## STEP 8

### **GOALS: Goals can be added individually by selecting "Add" at the top of the screen.**

It is NOT required to add in individual goals if your department/team/employees do not have goals. There will be organizational goals pre-populated into the system that you can select from.

The goal score under "Manager Summary" is a MANDATORY field.

The screenshot displays a web application interface for a 'Complete Manager Evaluation'. The browser title is 'Sandbox - maryfreebed' and the user is logged in as 'Mary Free Bed'. The page header includes a 'MENU' icon, the 'Mary Free Bed' logo, a search bar, and notification icons. A sidebar on the left lists navigation options: 'Goals' (selected), 'Feedback', 'Job Function', 'Competencies', 'Areas of Opportunity', 'Standards of Behavior', 'Overall', and 'Review and Submit'. The main content area is titled 'Complete Manager Evaluation' and shows 'Manager Evaluation: Annual Performance Evaluation for April Fiscal 2025: Kacie Hart...'. Below this, there is an 'Add' button in a rounded rectangle, which is highlighted with a green arrow. Underneath, the 'Manager Summary' section contains a 'Calculated Rating' field (empty) and a 'Rating' dropdown menu with 'select one' as the current selection. At the bottom of the form, there are four buttons: 'Back', 'Next' (highlighted in blue), 'Save', and 'Close'. A notification banner at the top of the main content area states: 'Autosave is enabled for this task, progress will save every 90 seconds.'

## STEP 9

**GOALS:** Click on 'Add Existing' to find a drop-down menu of pre-populated organization goals to add in.

The screenshot shows a web application interface for a 'Complete Manager Evaluation'. The page title is 'Manager Evaluation: Annual Performance Evaluation for April Fiscal 2025: Kacie Hart...'. The date range is '04/01/2024 - 03/31/2025'. The 'Goals' section is highlighted in the left sidebar. The main content area shows a form for adding a goal. A red box highlights the 'Add Existing' button. Below the form, there is a table for 'Milestones' with columns for \*Milestone, Due Date, and Status. The table is currently empty.

Autosave is enabled for this task, progress will save every 90 seconds.

**Goals**

Add Existing

Goal

Description

Due Date

Category

Organization Alignment

Status

Weighting

**Milestones**

0 items

*Milestone	Due Date	Status
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Back Next Save Close

## STEP 10

**GOALS: To manually add goals in, you can fill out the appropriate fields below. The only required fields would be the free text of goal title/description.**

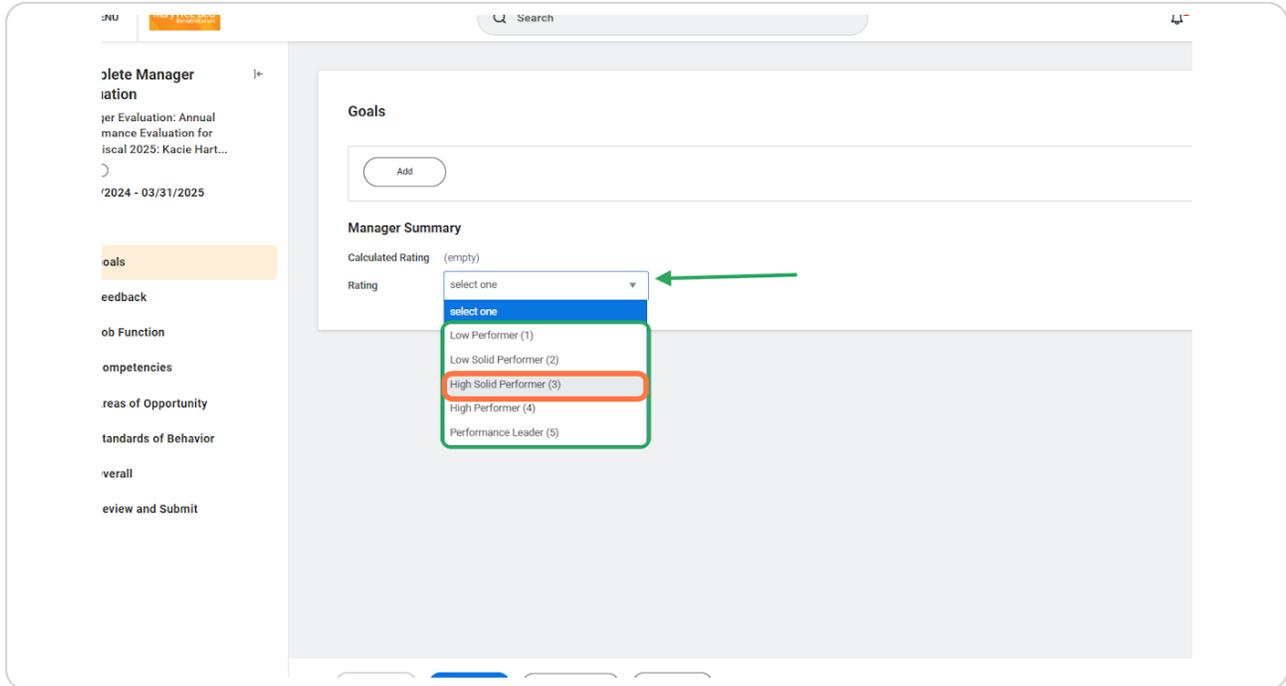
Leaders can add in as much information as they would like, all weighting you see in the goals would be within the bucket of 20% for the overall goals allocation to the overall score.

The screenshot shows a web-based form for creating a goal. The form is enclosed in a light gray border with a prominent orange border around the main input area. At the top, there is a dropdown menu labeled "Add Existing" with a list icon. Below it are two rich text editors: "Goal" (marked with a red asterisk) and "Description", both with format toolbars (bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink). The "Due Date" field is a date picker showing "MM/DD/YYYY". Below are dropdown menus for "Category" and "Organization Alignment". The "Status" field is a dropdown menu with "select one" selected. The "Weighting" field is a text input with "0" entered. A section titled "Milestones" is expanded, showing "0 items" and a table with columns for "Milestone", "Due Date", and "Status". The table is currently empty, displaying "No Data". At the bottom of the form are four buttons: "Back", "Next" (highlighted in blue), "Save" (with a save icon), and "Close".

## STEP 11

**GOALS: Rating within the "Manager Summary" section at the bottom of the page is REQUIRED.**

Select Rating and use our current rubric to select the appropriate score for the employee for goals.



The screenshot displays a web application interface for performance evaluation. On the left, a sidebar contains navigation options: 'Delete Manager Information', 'Performance Evaluation: Annual Performance Evaluation for Fiscal 2025: Kacie Hart...', '2024 - 03/31/2025', 'Goals' (highlighted in orange), 'Feedback', 'Job Function', 'Competencies', 'Areas of Opportunity', 'Standards of Behavior', 'Overall', and 'Review and Submit'. The main content area is titled 'Goals' and includes an 'Add' button. Below this is the 'Manager Summary' section, which contains a 'Calculated Rating' field (currently empty) and a 'Rating' dropdown menu. The dropdown menu is open, showing a list of performance levels: 'select one', 'Low Performer (1)', 'Low Solid Performer (2)', 'High Solid Performer (3)', 'High Performer (4)', and 'Performance Leader (5)'. A green arrow points to the dropdown menu, and a red box highlights the 'High Solid Performer (3)' option.

## STEP 12

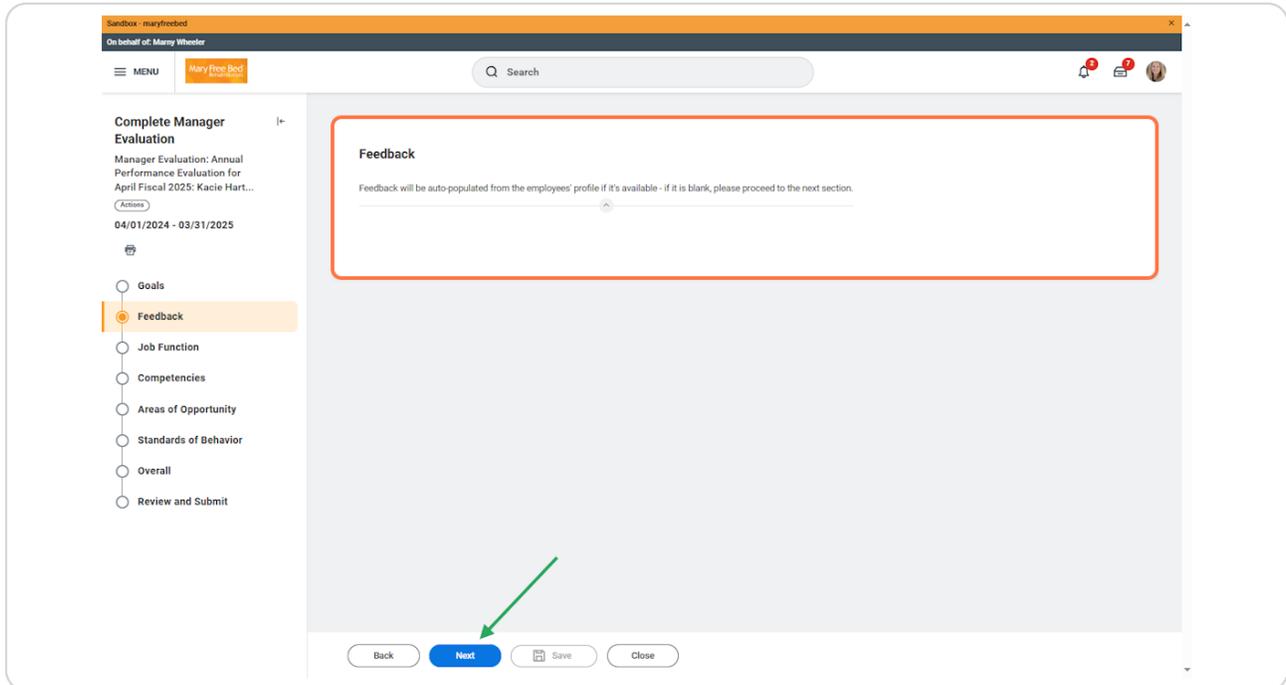
Click on Next to proceed to the next section or click on the titles on the left-hand side menu.

The screenshot displays a web application interface for a 'Complete Manager Evaluation'. The interface is divided into a left-hand navigation menu and a main content area. The navigation menu includes the following items: 'Goals' (highlighted in orange), 'Feedback', 'Job Function', 'Competencies', 'Areas of Opportunity', 'Standards of Behavior', 'Overall', and 'Review and Submit'. The main content area is titled 'Complete Manager Evaluation' and includes a 'Goals' section with an 'Add' button, and a 'Manager Summary' section. The 'Manager Summary' section shows a 'Calculated Rating (empty)' and a 'Rating' dropdown menu set to 'High Solid Performer (3)'. At the bottom of the interface, there are four buttons: 'Back', 'Next' (highlighted in blue), 'Save', and 'Close'. Green arrows indicate the flow: one arrow points from the 'Next' button to the 'Goals' menu item, and another arrow points from the 'Standards of Behavior' menu item to the 'Next' button.

## STEP 13

**FEEDBACK:** This section is a new feature of Workday that would allow any feedback on an employee during the review period to be shown at this step of the review process. Click "Next" to continue to the next section.

Since this is brand new, no employees will have feedback in this step. This is simply a placeholder to show how it can be incorporated into the review and where it would show up.



## STEP 14

**JOB FUNCTION: Complete this section which is based off the job description of each employee. Comments are optional, score at the bottom is MANDATORY.**

Selecting the 'link here' in the instructions will take you to the HR SharePoint library of all job description's so you can review.

Adding comments into each area of the Job Function categories is optional but will be a great opportunity to guide the conversation and give feedback to the employee.

Adding a score under "Manager Summary" is MANDATORY.

The screenshot shows a SharePoint page titled "Job Function" for a performance evaluation. The page is part of a "Complete Manager Evaluation" for "Kacie Hart" for the "April Fiscal 2025" period. The evaluation is for the period "04/01/2024 - 03/31/2025". The "Job Function" category is selected in the left-hand navigation menu.

The main content area contains instructions for completing the evaluation. A red box highlights the instructions, and a green arrow points to a blue link: "link here". The instructions state: "As you prepare to complete performance reviews, it is important to assess each employee's job functions accurately and fairly. OPTIONAL: use the below sections to add comments or utilize to guide the employee on feedback for their specific role and job description. Begin by revisiting the employee's job description to confirm key responsibilities and expectations associated with their role. Ensure that ratings are based on objective criteria. You can view all job descriptions on the HR Sharepoint Site. [link here](#). Only thing required on this page is the Rating at the bottom of the page."

Below the instructions is a table with 9 items, each representing a competency. The table has three columns: "Competency", "Description", and "Manager Evaluation". The "Manager Evaluation" column contains a "Comment" field for each competency. Green arrows point to the "Comment" fields for "Decision Making/Problem Solving", "Initiative", and "Communication".

Competency	Description	Manager Evaluation
Job Performance	Achieves performance standards and expectations (e.g. quality, quantity, and timeliness of work results).	Comment
Decision Making/Problem Solving	Effectively engages others in analyzing issues/needs throughout the decision-making process as appropriate to make sound, timely decisions. Works collaboratively with affected groups to monitor impacts of decision and make adjustments accordingly.	Comment
Initiative	Takes proactive steps to address tasks or challenges without needing direct supervision or prompting. It includes the willingness to go beyond assigned responsibilities, suggest improvements, and contribute ideas that enhance productivity and workplace efficiency.	Comment
Communication	Communicates effectively, consistently, and responsibly both verbally and in writing. Demonstrates active listening skills and good judgment relative to confidentiality and audience.	Comment
Attendance and Punctuality	Reliability in being present at work and their ability to arrive on time.	Comment

At the bottom of the page are buttons for "Back", "Next", "Save", and "Close".

## STEP 15

### Click on High Solid Performer (3)

The screenshot shows a web application interface for a 'Complete Manager Evaluation'. On the left is a navigation sidebar with options: Goals, Feedback, Job Function (highlighted), Competencies, Areas of Opportunity, Standards of Behavior, Overall, and Review and Submit. The main content area is a table with columns for 'Initiative', 'Description', and 'Comment'. The 'Rating' dropdown menu is open, showing options from 'Low Performer (1)' to 'Performance Leader (5)', with 'High Solid Performer (3)' highlighted in red. A green arrow points to the dropdown menu, and another green arrow points to the 'Next' button at the bottom of the form.

Initiative	Description	Comment
Initiative	Takes proactive steps to address tasks or challenges without needing direct supervision or prompting. It includes the willingness to go beyond assigned responsibilities, suggest improvements, and contribute ideas that enhance productivity and workplace efficiency.	<input type="text"/>
Communication	Communicates effectively, consistently, and responsibly both verbally and in writing. Demonstrates active listening skills and good judgment relative to confidentiality and audience.	<input type="text"/>
Attendance and Punctuality	Reliability in being present at work and their ability to arrive on time.	<input type="text"/>
Dependability	Reliability in completing tasks and fulfilling responsibilities as expected. Consistently meets deadlines, follows through on commitments, and can be counted on to maintain the quality of their work.	<input type="text"/>
Work outcomes/deliverables	Tangible results or outputs produced by an employee in their role	<input type="text"/>
Customer Service	Deliver quality service across customer groups. Establishes and maintains effective customer relationships.	<input type="text"/>
Teamwork	Demonstrates strong commitment to towards accomplishing team goals and maintaining necessary relationships to achieve results. Acknowledges and encourages team members' contributions and accepts feedback from team members.	<input type="text"/>

Rating: **High Solid Performer (3)**

Buttons: Back, Next, Save, Close

## STEP 16

### Click on 'Next' to proceed to the next section

This screenshot shows the same 'Complete Manager Evaluation' form as in Step 15, but now the 'Rating' dropdown is closed and shows 'High Solid Performer (3)'. A green arrow points to the 'Next' button in the bottom navigation bar, which is highlighted in red.

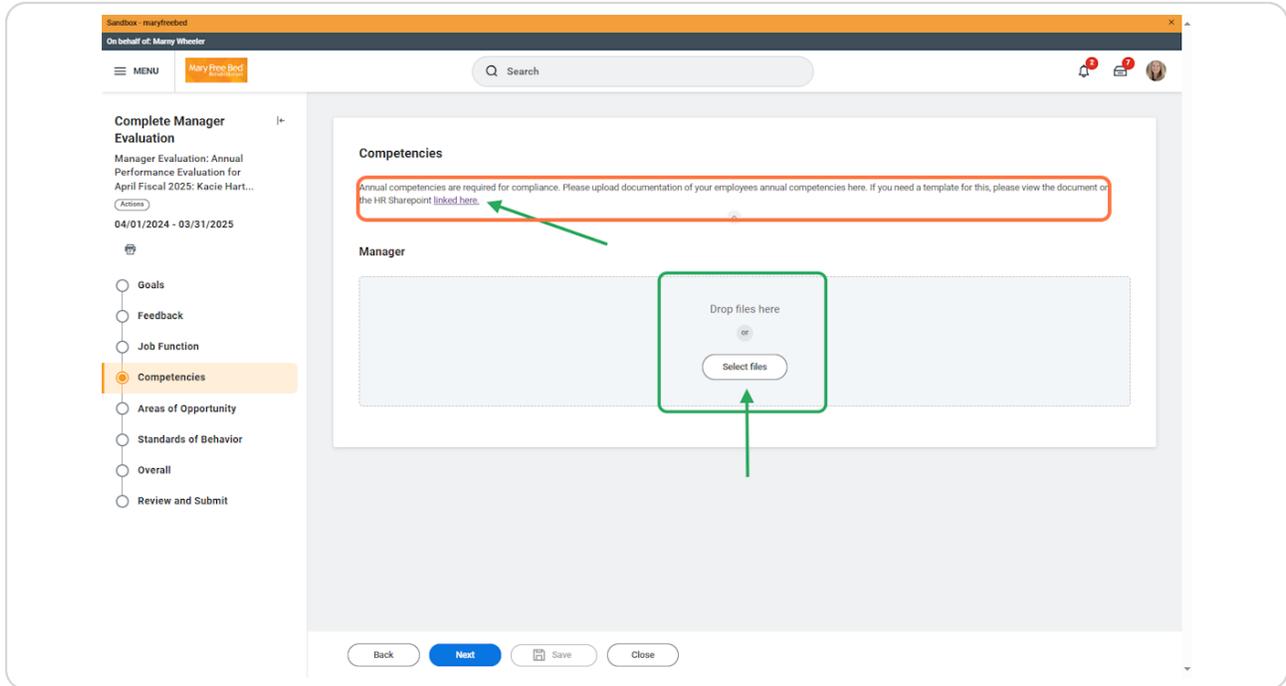
Rating: High Solid Performer (3)

Buttons: Back, Next, Save, Close

## STEP 17

### COMPETENCIES: Upload annual competencies for the employee in the box shown.

All employees should be completing annual competencies for their role. A template is provided in the instructions of this section at the link shown.



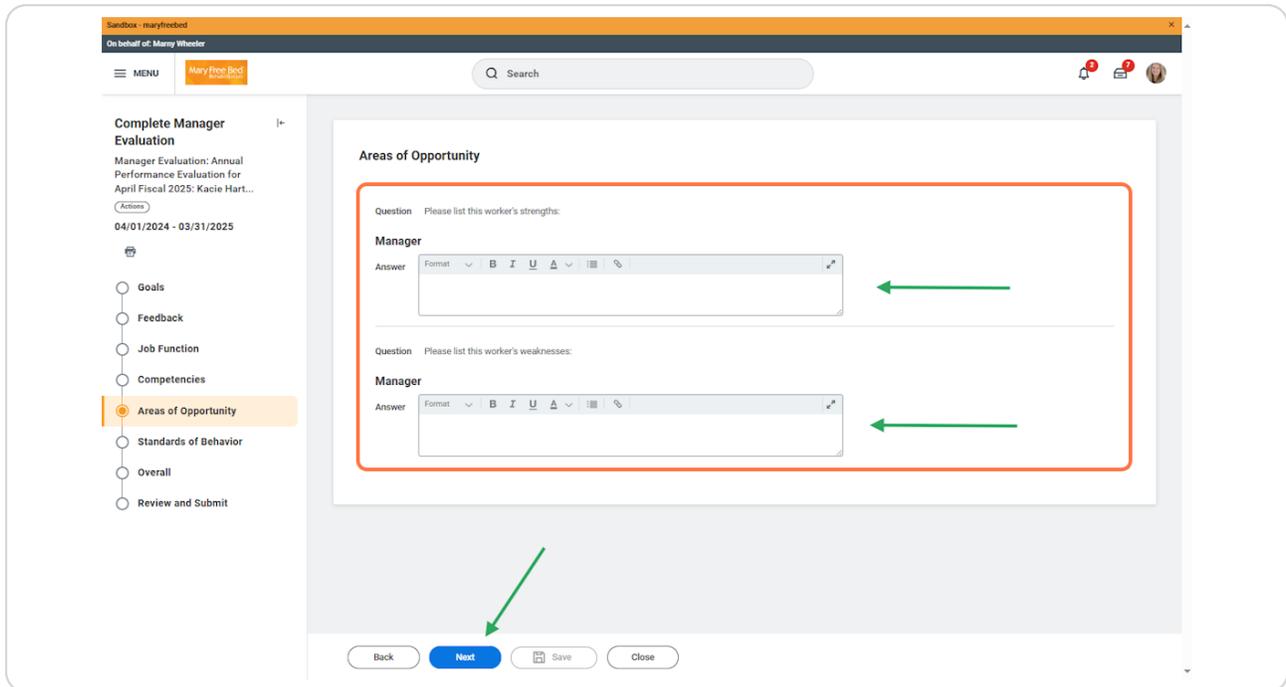
## STEP 18

Click on 'Next' to proceed to the next section.

The screenshot displays a web application interface for a 'Complete Manager Evaluation'. The top navigation bar includes a 'MENU' icon, a 'Mary Edge B&B' logo, and a search bar. The main content area is titled 'Complete Manager Evaluation' and shows 'Manager Evaluation: Annual Performance Evaluation for April Fiscal 2025: Kacie Hart...'. A sidebar on the left lists evaluation steps: Goals, Feedback, Job Function, Competencies (highlighted), Areas of Opportunity, Standards of Behavior, Overall, and Review and Submit. The 'Competencies' section contains a text area with instructions and a 'Manager' section with a file upload area labeled 'Drop files here' and a 'Select files' button. At the bottom, a navigation bar features 'Back', 'Next' (highlighted with a green arrow), 'Save', and 'Close' buttons.

## STEP 19

**OPTIONAL:** Strengths and Areas of Opportunity can be completed for employees to guide conversation and provide additional feedback. This is an optional step, so click 'Next' to proceed to the next section.



The screenshot shows a web application interface for a performance evaluation. On the left, a sidebar titled 'Complete Manager Evaluation' lists various sections: Goals, Feedback, Job Function, Competencies, Areas of Opportunity (highlighted in orange), Standards of Behavior, Overall, and Review and Submit. The main content area is titled 'Areas of Opportunity' and contains two text input fields. The first field is for 'Strengths' and the second is for 'Weaknesses'. Each field has a 'Question' label and a 'Manager' label. Below each field is a text input area with a rich text editor toolbar. Green arrows point to the text input areas for both fields. At the bottom of the page, there are four buttons: 'Back', 'Next' (highlighted in blue), 'Save', and 'Close'. A green arrow points to the 'Next' button.

## STEP 20

### **STANDARDS OF BEHAVIOR (SOB): Complete this section for each employee. Comments are optional, score at the bottom is MANDATORY.**

Selecting the 'link here' in the instructions will take you to the full breakdown of our Standards of Behavior for you to review.

Adding comments into each area of the Standards of Behavior (SOB) categories is optional but will be a great opportunity to guide the conversation and give feedback to the employee.

Adding a score under "Manager Summary" is MANDATORY.

**Standards of Behavior**

As a part of our performance review process, it is essential to assess how each team member aligns with Mary Free Bed's established Standards of Behavior. OPTIONAL: utilizing the comment section under each competency group is helpful to align an employee with areas of opportunity and guide the performance review conversation. If you do not wish to utilize, you can leave blank.

Please consider the following components that make up our Standards of Behavior while assessing your employee. Ensure that ratings are based on objective criteria. The only thing required on this section is the score under Rating at the bottom. You must fill this out to continue.

Please click this link to see Mary Free Bed's full explanation of the [Standards of Behavior](#).

Competency	Manager Evaluation
Equity & Inclusion	Comment
Care & Compassion	Comment
Communication & Collaboration	Comment
Respect & Recognition	Comment
Professionalism and Innovation	Comment
Safety AND Quality	Comment

Back Next Save Close

## STEP 21

**STANDARDS OF BEHAVIOR (SOB): Comments are optional, score at the bottom is MANDATORY. Click on 'Next' to proceed to next section after entering score.**

Selecting the 'link here' in the instructions will take you to the full breakdown of our Standards of Behavior for you to review.

Adding comments into each area of the Standards of Behavior (SOB) categories is optional but will be a great opportunity to guide the conversation and give feedback to the employee.

Adding a score under "Manager Summary" is MANDATORY.

The screenshot displays a web-based form for a "Complete Manager Evaluation". The left sidebar contains navigation options: "Goals", "Feedback", "Job Function", "Competencies", "Areas of Opportunity", "Standards of Behavior" (highlighted in orange), "Overall", and "Review and Submit". The main content area is titled "6 Items" and lists several competency categories, each with a "Manager Evaluation" section containing a "Comment" field. The categories are: Equity & Inclusion, Care & Compassion, Communication & Collaboration, Respect & Recognition, Professionalism and Innovation, and Safety. A dropdown menu is open for the "Rating" field, showing options: "Low Performer (1)", "Low Solid Performer (2)", "High Solid Performer (3)", "High Performer (4)", and "Performance Leader (5)". The "High Solid Performer (3)" option is highlighted with a red box. A green arrow points to the "Next" button at the bottom of the form, which is also highlighted with a red box. Other buttons include "Back", "Save", and "Close".

## STEP 22

**OVERALL SCORE:** The score will be calculated on the 40-40-20 weighting and shown in the parenthesis. Leaders have the opportunity to confirm or over-ride that score should they choose.

The screenshot displays the 'Complete Manager Evaluation' interface in Workday. The left sidebar shows a navigation menu with 'Overall' selected. The main content area is titled 'Overall' and contains the following information:

**Overall**

Workday will use our current grading standard (40-40-20) to calculate the overall score in this section. You will see that specific number reflected in the Rating and shown in the (Rounded from) parenthesis. As a leader, you have the ability to override this score in the blank box below. If you do not wish to adjust, leave blank and submit. If you do change, this will be reflected in calibration and the summary, so you may be asked for further clarification from your up-line regarding changes.

**Manager**

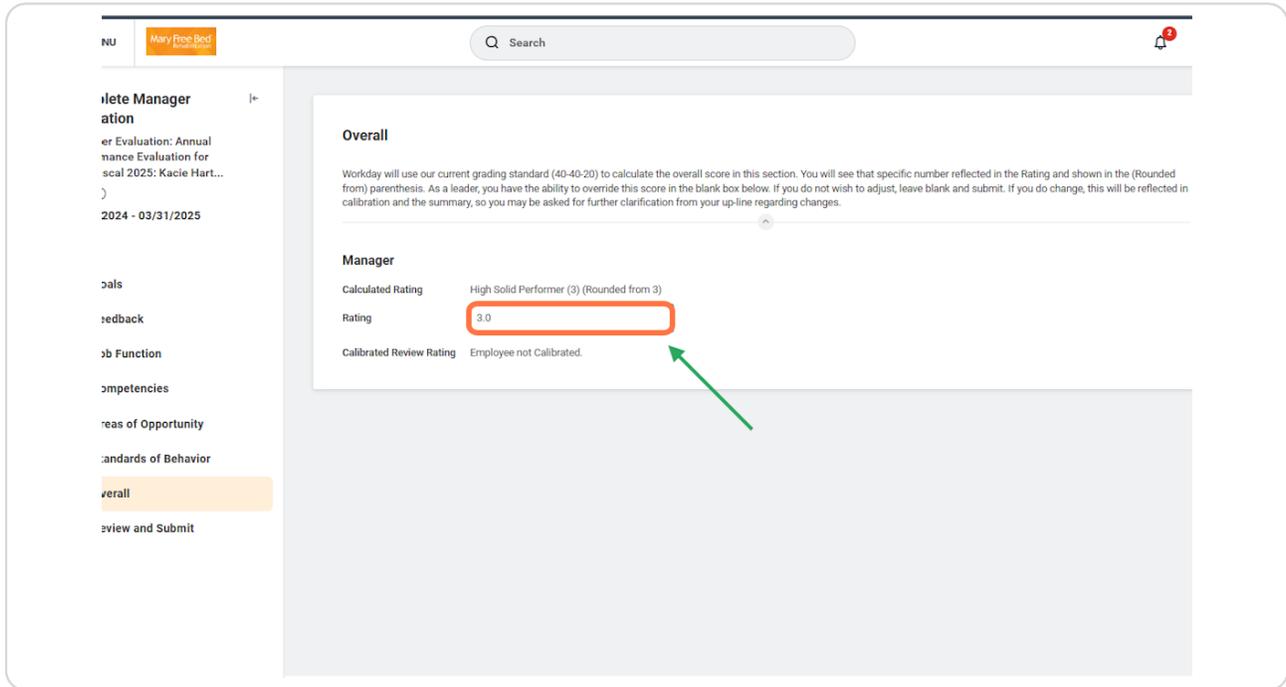
Calculated Rating	High Solid Performer (3) (Rounded from 3)
Rating	<input type="text" value="0"/>
Calibrated Review Rating	Employee not Calibrated.

At the bottom of the interface, there are four buttons: 'Back', 'Next', 'Save', and 'Close'. A red box highlights the 'Calculated Rating' and the 'Rating' input field, with a green arrow pointing to the 'Rating' input field.

## STEP 23

**OVERALL SCORE: Confirm the score you as a Leader would like to give the employee, either by typing in the same score shown in parenthesis or an over-ridden score.**

The "(Rounded from \_\_\_)" score will still appear if you over-ride the overall rating. This would need to be justified to your up-line in the Calibration process, so be prepared to talk any changes over with them.



The screenshot shows a web interface for a performance evaluation system. On the left is a navigation menu with items like 'Delete Manager', 'Performance Evaluation: Annual Performance Evaluation for fiscal 2025: Kacie Hart...', '2024 - 03/31/2025', 'Goals', 'Feedback', 'Job Function', 'Competencies', 'Areas of Opportunity', 'Standards of Behavior', 'Overall', and 'Review and Submit'. The 'Overall' item is highlighted in orange. The main content area is titled 'Overall' and contains a paragraph explaining the grading standard (40-40-20) and the rounding process. Below this, under the 'Manager' section, there are three rows: 'Calculated Rating' with the value 'High Solid Performer (3) (Rounded from 3)', 'Rating' with a text input field containing '3.0' (highlighted with a red box and a green arrow), and 'Calibrated Review Rating' with the value 'Employee not Calibrated.'.

## STEP 24

Click on 'Next' to proceed to the final review and submission for the employee review.

The screenshot shows a web interface for a 'Complete Manager Evaluation'. The left sidebar contains a navigation menu with the following items: Goals, Feedback, Job Function, Competencies, Areas of Opportunity, Standards of Behavior, Overall (highlighted with an orange bar), and Review and Submit. The main content area is titled 'Overall' and contains the following text: 'Workday will use our current grading standard (40-40-20) to calculate the overall score in this section. You will see that specific number reflected in the Rating and shown in the (Rounded from) parenthesis. As a leader, you have the ability to override this score in the blank box below. If you do not wish to adjust, leave blank and submit. If you do change, this will be reflected in calibration and the summary, so you may be asked for further clarification from your up-line regarding changes.'

Below the text, there is a 'Manager' section with the following data:

Calculated Rating	High Solid Performer (3) (Rounded from 3)
Rating	<input type="text" value="3.0"/>
Calibrated Review Rating	Employee not Calibrated.

At the bottom of the form, there are four buttons: 'Back', 'Next' (highlighted with a red border and a green arrow), 'Save', and 'Close'.

## STEP 25

**REVIEW AND SUBMIT: Scroll through the review and confirm everything is correct. Select "Submit" at the bottom of the screen to lock in your review for Calibration and next steps.**

Submitting the review does NOT send it to the employee for them to see/review. This simply kicks off the next step of leader/HR related tasks that include Calibration for your team and downline. You MUST submit all employee's reviews and scores prior to calibration.

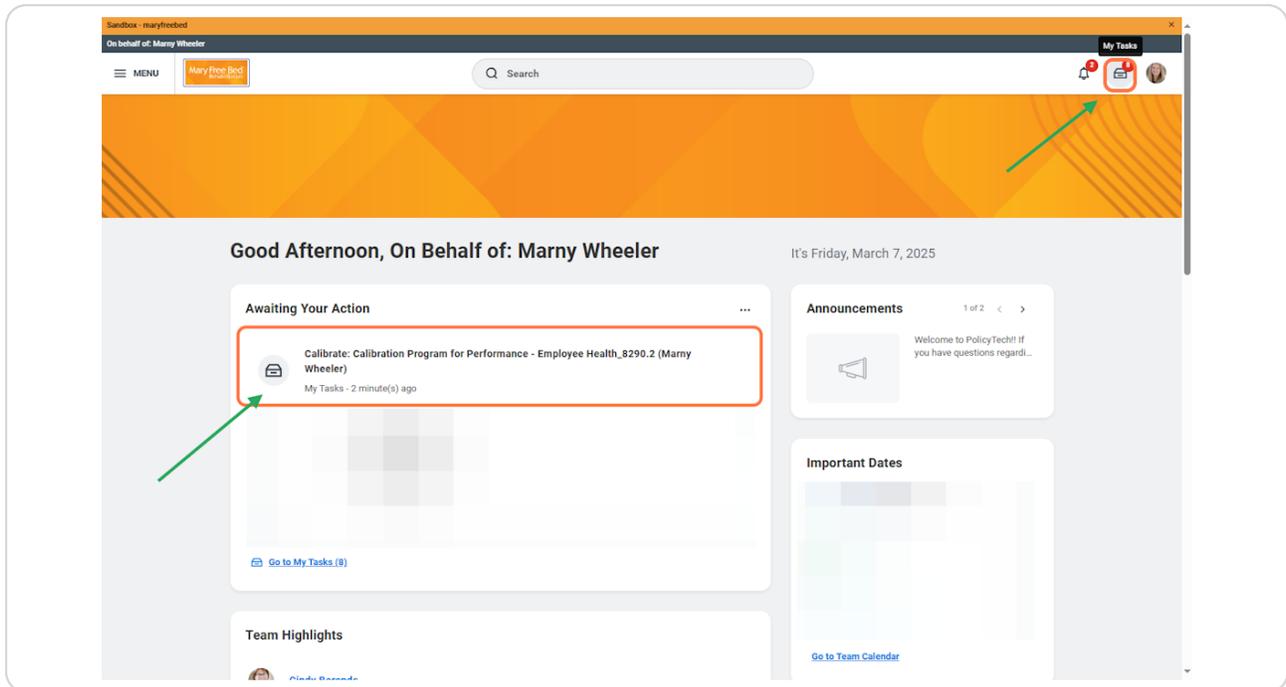
The screenshot displays a web application interface for a performance evaluation. The browser address bar shows 'Sandbox - maryfreed' and the user is logged in as 'Mary Free Bed'. The page title is 'Complete Manager Evaluation' for 'Manager Evaluation: Annual Performance Evaluation for April Fiscal 2025: Kacie Hart...'. The evaluation period is '04/01/2024 - 03/31/2025'. A sidebar on the left contains a navigation menu with the following items: Goals, Feedback, Job Function, Competencies, Areas of Opportunity, Standards of Behavior, Overall, and 'Review and Submit' (which is highlighted in orange). The main content area is divided into sections: 'Goals', 'Manager Summary' (showing a 'Calculated Rating' of '(empty)' and a 'Rating' of 'High Solid Performer (3)'), 'Feedback', and 'Job Function'. The 'Job Function' section contains a table with 9 items. Two items are visible:

Competency	Description	Manager Evaluation
Job Performance	Achieves performance standards and expectations (e.g. quality, quantity, and timeliness of work results)	Comment
Decision Making/Problem Solving	Effectively engages others in analyzing issues/needs throughout the decision-making process as appropriate to make sound, timely	Comment

At the bottom of the 'Job Function' section, there are two buttons: 'Submit' (highlighted in blue) and 'Save for Later'. Two green arrows point from the 'Review and Submit' menu item to the 'Submit' button.

## STEP 26

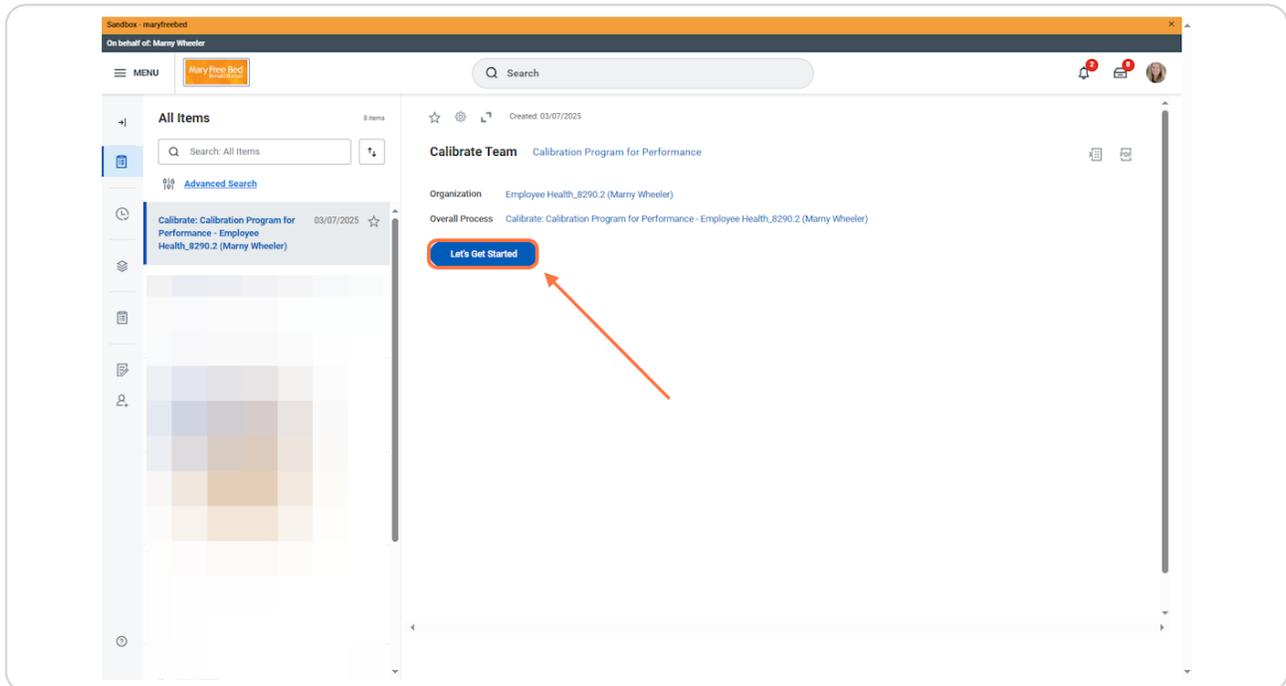
**CALIBRATION: Once HR kicks off Calibration, you will receive a task labeled "Calibrate: Calibration Program for Performance". Select from home screen or in the "My Tasks" button in top right-hand corner.**



## STEP 27

### **CALIBRATION: Click on 'Let's Get Started' to view your down-lines scores and distribution.**

This will only show your own direct reports scores and reviews. There is an additional report called "Worker Ratings for Performance Review" available to Leaders who need/want to see their full subordinate organizations reviews and scores.

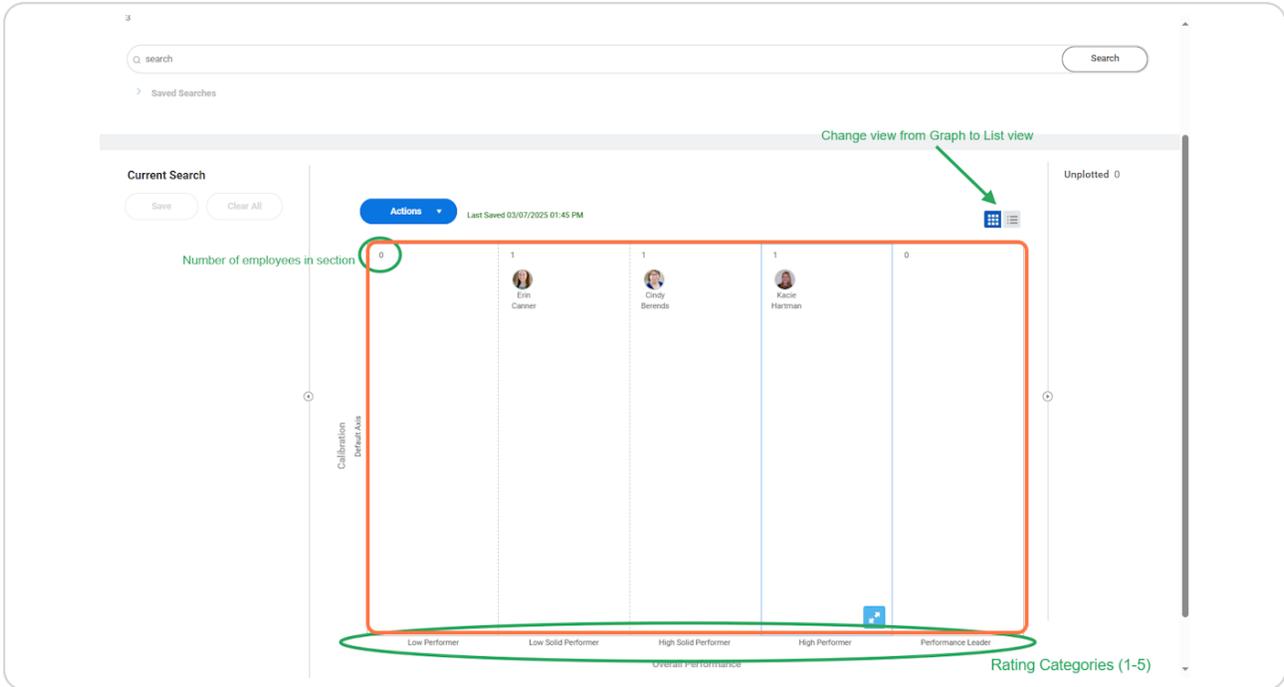


## STEP 28

### **CALIBRATION: All employees and scores will be plotted on to this table to show the distribution of ratings in your department.**

Leaders can drill down into each section to view and drag and drop people into different sections if there is a need for adjustment. You can view it in the Grid view shown here, or in the List view, shown in the next step.

Any changes will need to be justified to your up-line so please prepare for this when changes occur.



## STEP 29

### **CALIBRATION: Alternate view - All employees and scores will be plotted on to this list to show the distribution of ratings in your department.**

Leaders can drill down into each section to view and drag and drop people into different sections if there is a need for adjustment. You can view it in the Grid view shown here, or in the List view, shown in the next step.

Any changes will need to be justified to your up-line so please prepare for this when changes occur.

The screenshot displays a software interface for employee management. At the top, there is a search bar with the text 'search' and a 'Search' button. Below the search bar, there is a 'Saved Searches' section. The main content area is titled 'Current Search' and includes 'Save' and 'Clear All' buttons. A table with 11 columns is shown, containing data for three employees. The columns are: Photo, Worker, Placement, Organization, Job Profile, Performance, Time in Position, Retention, Loss Impact, Succession Plans, and Nominations by Job Profile. The table is titled '3 items' and has a 'Last Saved 03/07/2025 01:45 PM' timestamp. The table data is as follows:

Photo	Worker	Placement	Organization	Job Profile	Performance	Time in Position	Retention	Loss Impact	Succession Plans	Nominations by Job Profile
	Cindy Berends	Default A High Soil Performe	Employee Health_8290.2 (Many Wheeler)	1081.H - LPN_1081.H		2 year(s), 8 month(s), 15 day(s)				
	Erin Canner	Default A Low Soil Performe	Employee Health_8290.2 (Many Wheeler)	1834.S - Employee Wellbeing Coordinator_1834.S		3 year(s), 6 month(s), 19 day(s)				
	Kacie Hartman	Default A High Performe	Employee Health_8290.2 (Many Wheeler)	1833.H - Occupational Health Coordinator_1833.H		4 year(s), 2 month(s), 3 day(s)				

## STEP 30

**CALIBRATION:** Once you're happy with scores, you will select "Actions" and "Submit Calibration" to send this on to the Manager's Manager for sign off.

The screenshot displays a performance calibration interface. At the top, there is a search bar and a 'Saved Searches' link. Below this, a 'Current Search' section contains 'Save' and 'Clear All' buttons. The main area is a grid with columns for performance levels: Low Performer, Low Solid Performer, High Solid Performer, High Performer, and Performance Leader. The rows represent individual employees: Erin Carner, Cindy Berends, and Kacie Harman. The grid shows scores of 0 or 1 for each employee in each category. An 'Actions' button is located at the top of the grid, highlighted with a red circle and an arrow pointing to it. The text 'Last Saved 03/07/2025 01:45 PM' is visible next to the Actions button. On the right side, there is a vertical axis labeled 'Unplotted 0'.

Employee	Low Performer	Low Solid Performer	High Solid Performer	High Performer	Performance Leader
Erin Carner	0	1	1	1	0
Cindy Berends	0	1	1	1	0
Kacie Harman	0	1	1	1	0

## STEP 31

**CALIBRATION:** Once you're happy with scores, you will select "Actions" and "Submit Calibration" to send this on to the Manager's Manager for sign off.

The screenshot displays a calibration interface. At the top left, there is a section for 'Saved Searches' and a search bar. Below this is a 'Filter Search' section with a 'Save' button and a 'Clear All' button. The main area shows a table with columns for scores and worker names. The first column has a score of '0', and the subsequent three columns have scores of '1'. The workers listed are Erin Canner, Cindy Berends, and Kacie Hartman. A dropdown menu is open over the 'Submit Calibration' button, which is highlighted with an orange arrow. The dropdown menu contains two options: 'Hide Workers' and 'Submit Calibration'. The 'Submit Calibration' option is highlighted with an orange border. A timestamp 'Last Saved 03/07/2025 01:45 PM' is visible in the top right corner of the table area.

Score	Worker
0	
1	Erin Canner
1	Cindy Berends
1	Kacie Hartman

## STEP 32

**CALIBRATION: Click on 'Submit' to finalize these numbers and send on.**

The screenshot shows a 'Submit Calibration' dialog box. At the top, it says 'Click Submit to complete your calibration submission.' Below this is a chart area with a vertical axis labeled 'Calibration Default Axis' and a horizontal axis labeled 'Overall Performance'. The chart is divided into five vertical sections representing performance levels: 'Low Performer', 'Low Solid Performer', 'High Solid Performer', 'High Performer', and 'Performance Leader'. The 'Low Solid Performer' and 'High Solid Performer' sections each contain a small profile icon and the number '1'. The 'Low Performer' and 'Performance Leader' sections contain the number '0'. To the right of the chart, it says 'Unplotted 0'. At the bottom of the dialog, there are two buttons: 'Submit' (highlighted with a red border and a red arrow pointing to it) and 'Close'.

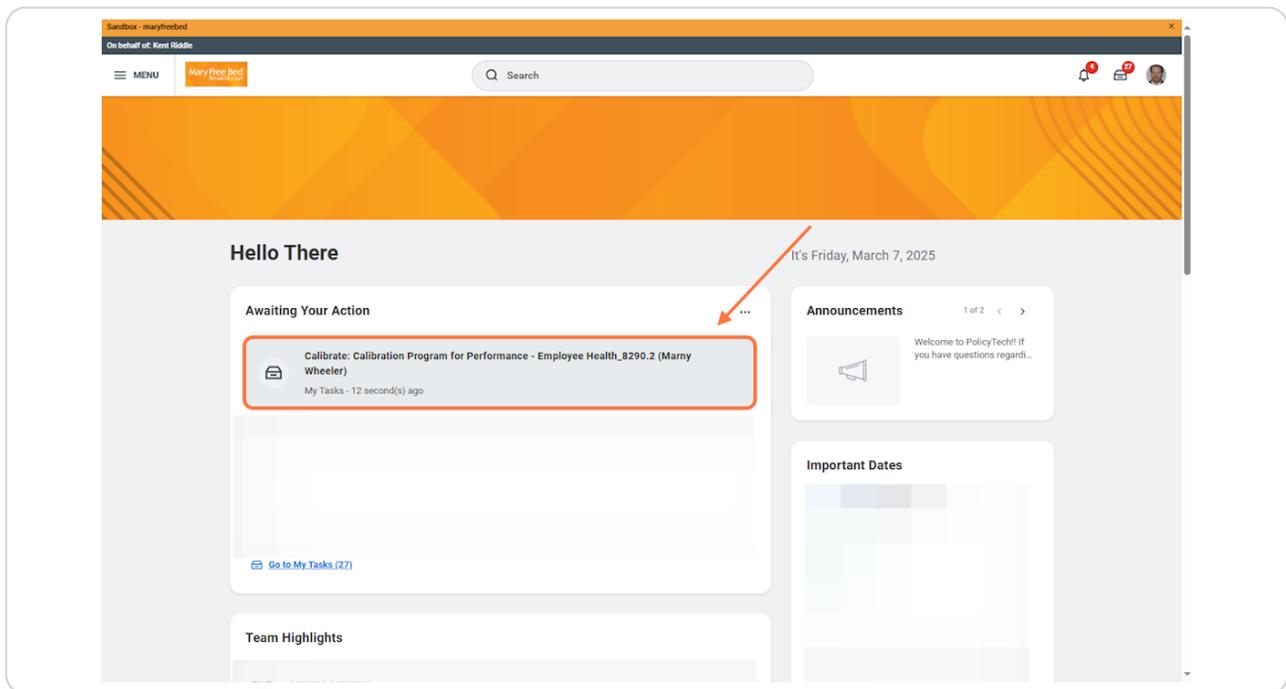
## STEP 33

### **MANAGER'S MANAGER CALIBRATION: After the Manager submits their calibration, it will go to the Manager's Manager for sign off.**

Manager's Manager will see the "Calibrate: Calibration Program for Performance" task for each department under their supervision show up in "My Tasks". You will view them individually and sign off on each.

Manager's Manager will NOT be able to change scores during this step, but any concerns or changes need to be addressed directly with the Manager. This is simply a check and balance step and an approval for each area.

This will only show each Manager's direct reports scores and reviews. There is an additional report called "Worker Ratings for Performance Review" available to Leaders who need/want to see their full subordinate organizations reviews and scores.



## STEP 34

**MANAGER'S MANAGER CALIBRATION: In each task, select 'View Details' to view the table of scores to calibrate.**

The screenshot displays a web application interface for a calibration task. The top navigation bar includes a search bar and user profile information. The main content area is divided into several sections:

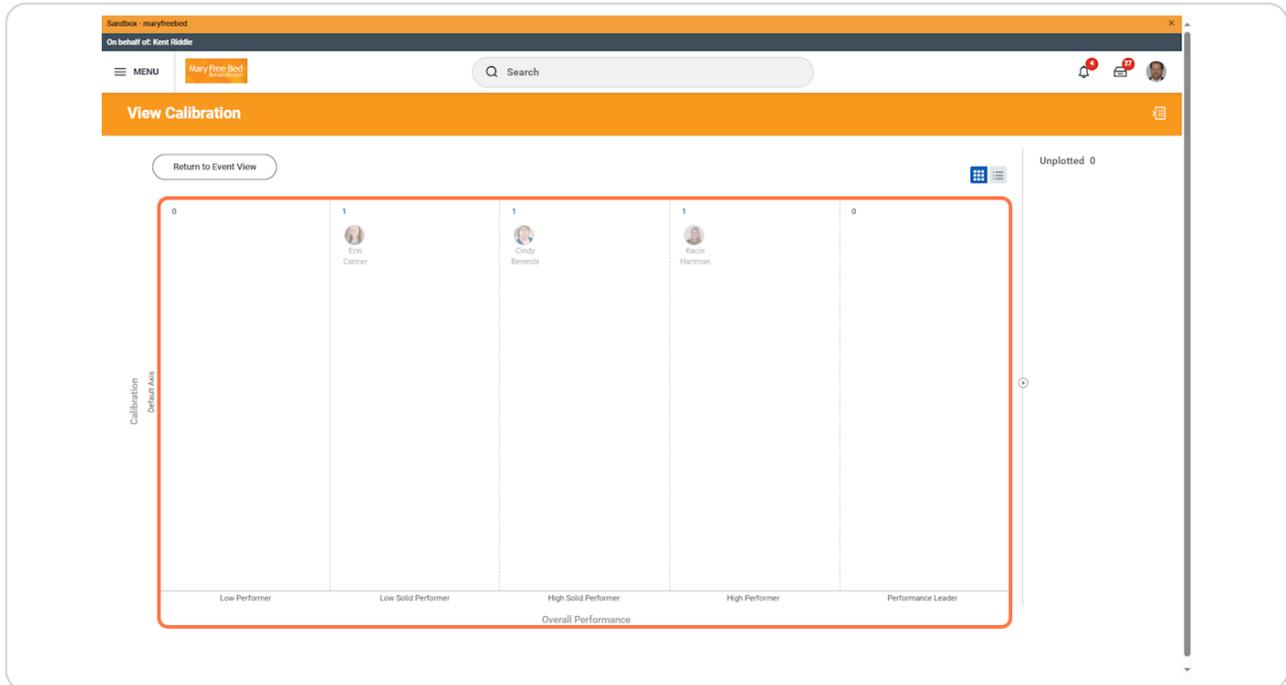
- All Items:** A list of items with a search bar and a date filter (03/07/2025).
- Review:** A section containing the task title "Calibrate: Calibration Program for Performance - Employee Health\_8290.2 (Marry Wheeler)", which is circled in red. Below it, the "For" field is "Employee Health\_8290.2 (Marry Wheeler)".
- Overall Process:** "Calibrate: Calibration Program for Performance - Employee Health\_8290.2 (Marry Wheeler)".
- Overall Status:** "In Progress".
- Details to Review:** A section with a "View Details" button highlighted by a red arrow. Below it, the "Background Process" is "Business Process Participant Initiation (03/07/2025, 1:42:17.051 PM)" and the "Background Process Status" is "Completed".
- Calibrate Team Processes:** "1".
- Process History:** A list of actions performed by Hannah Heisler and Kent Riddle, including "Launch Calibration - Step Completed", "To Do: Hold Until All Reviews are Complete - Step Completed", and "Approval by Manager's Manager - Awaiting Action".

At the bottom of the interface, there are four buttons: "Approve", "Send Back", "Deny", and "Cancel".

## STEP 35

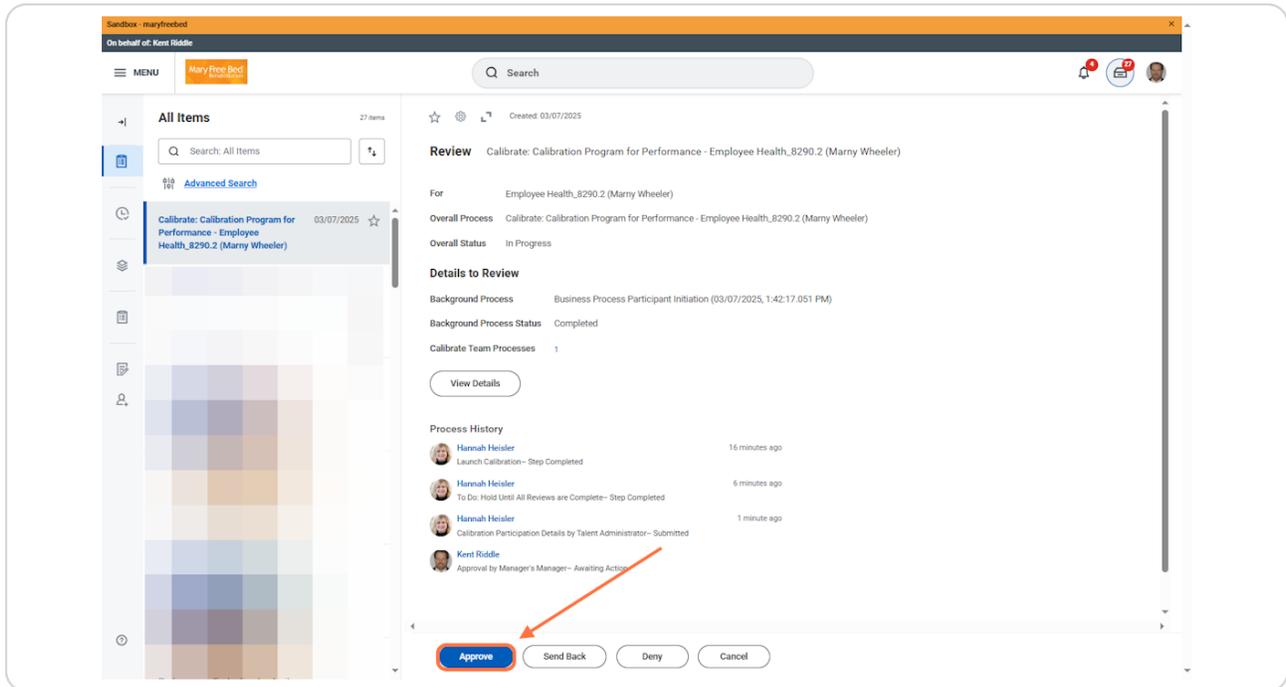
### **MANAGER'S MANAGER CALIBRATION: 'View Details' to view the table of scores to calibrate and connect with each manager if there are questions on distribution of scores.**

Manager's Manager can NOT edit scores or adjust ratings in this step. It needs to go back to the Manager for any updates.



## STEP 36

### **MANAGER'S MANAGER CALIBRATION: Select 'Approve' to finalize these scores and send back to HR for Merit/Market calculation.**

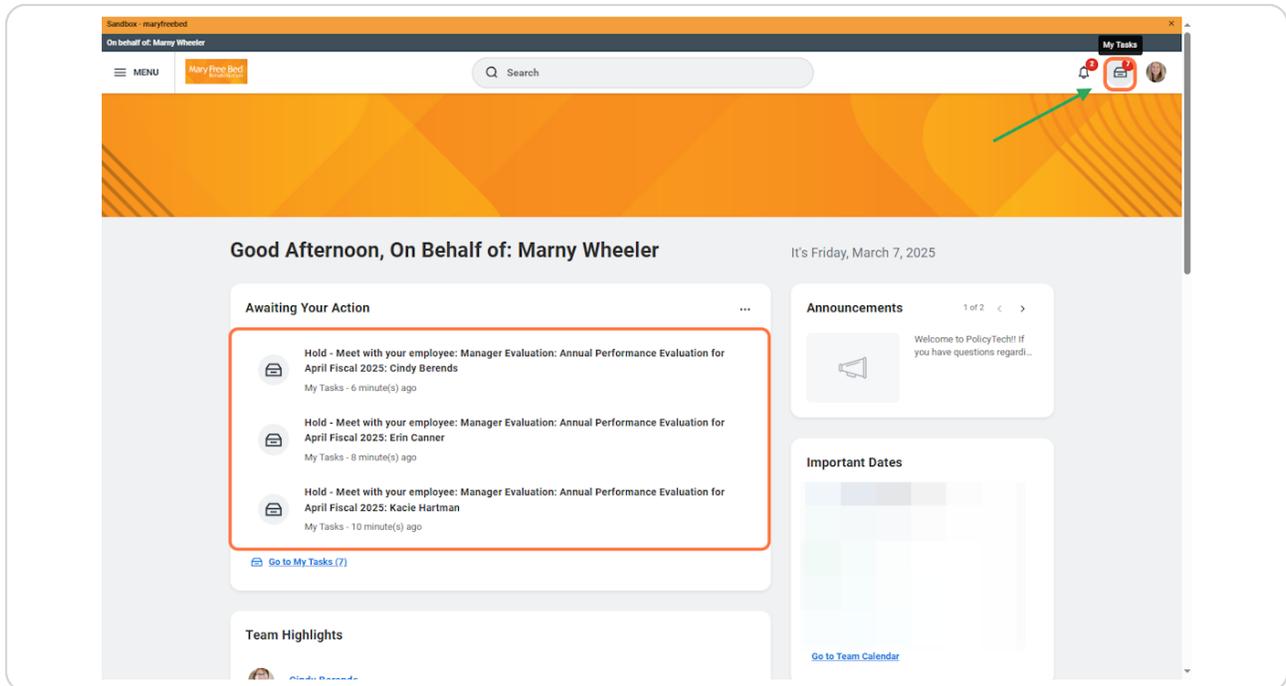


STOP! If you've made any changes to employees scores throughout the Calibration process, it MUST be sent to HR@maryfreebed.com for us to upload prior to the Merit/Market analysis process. Not sending will result in scores being calculated off original entered score from manager review.

## STEP 37

**DELIVER REVIEW TO EMPLOYEE: After Calibration is complete, tasks will re-appear in your inbox that are labeled "Hold - Meet with your employee"**

Employees will NOT receive the reviews until the task is submitted.



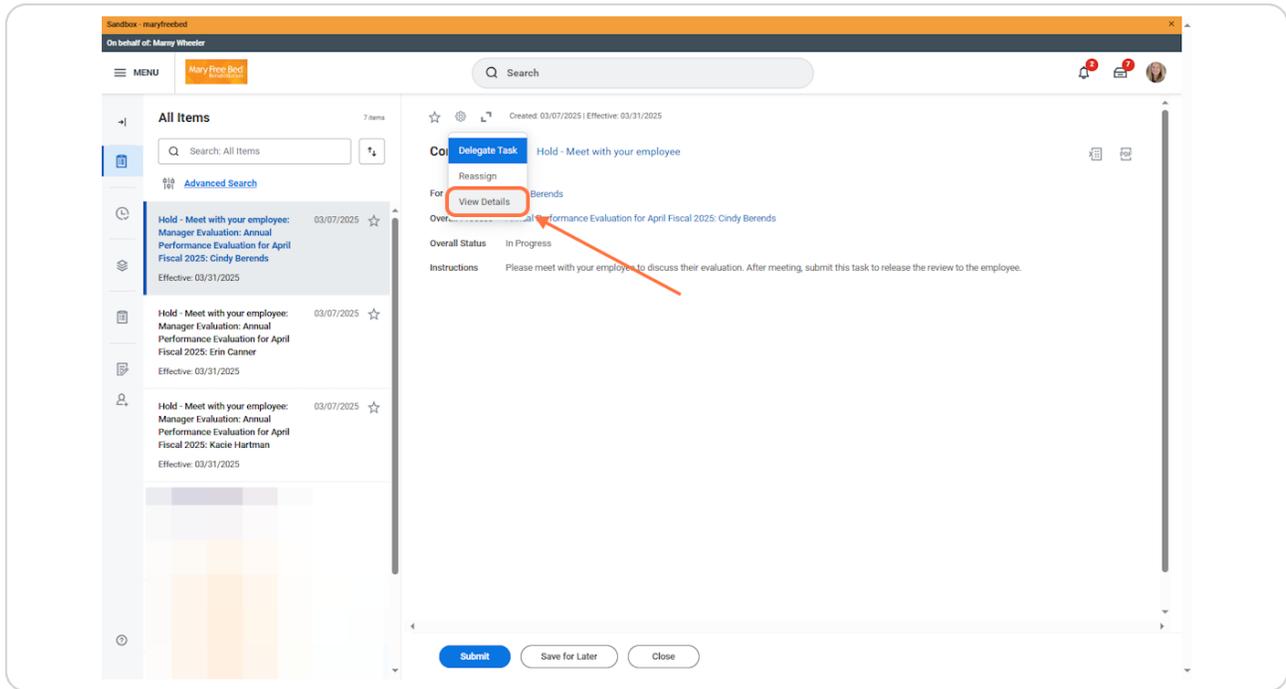
## STEP 38

**DELIVER REVIEW TO EMPLOYEE: Viewing the review for each employee prior to meeting with employee, select the "task actions" gear shift at the top of the item.**

The screenshot displays a web application interface for task management. At the top, there is a navigation bar with a 'MENU' icon, a 'Mary Beth Bod' profile, and a search bar. Below the navigation bar, the main content area is divided into two sections. On the left, there is a list of tasks under the heading 'All Items'. The first task is 'Hold - Meet with your employee: Manager Evaluation: Annual Performance Evaluation for April Fiscal 2025: Cindy Berends', with an effective date of 03/31/2025. The second task is 'Hold - Meet with your employee: Manager Evaluation: Annual Performance Evaluation for April Fiscal 2025: Erin Canner', with an effective date of 03/31/2025. The third task is 'Hold - Meet with your employee: Manager Evaluation: Annual Performance Evaluation for April Fiscal 2025: Kacie Hartman', with an effective date of 03/31/2025. On the right, there is a detailed view of a task titled 'Complete To Do: Hold - Meet with your employee'. This view shows the task is for 'Cindy Berends', with an overall process of 'Annual Performance Evaluation for April Fiscal 2025: Cindy Berends' and an overall status of 'In Progress'. The instructions state: 'Please meet with your employee to discuss their evaluation. After meeting, submit this task to release the review to the employee.' At the bottom of the task view, there are three buttons: 'Submit', 'Save for Later', and 'Close'. A red circle highlights the gear icon (task actions) at the top of the task list, with a red arrow pointing to it.

## STEP 39

### DELIVER REVIEW TO EMPLOYEE: Select "View Details" to open the review details



## STEP 40

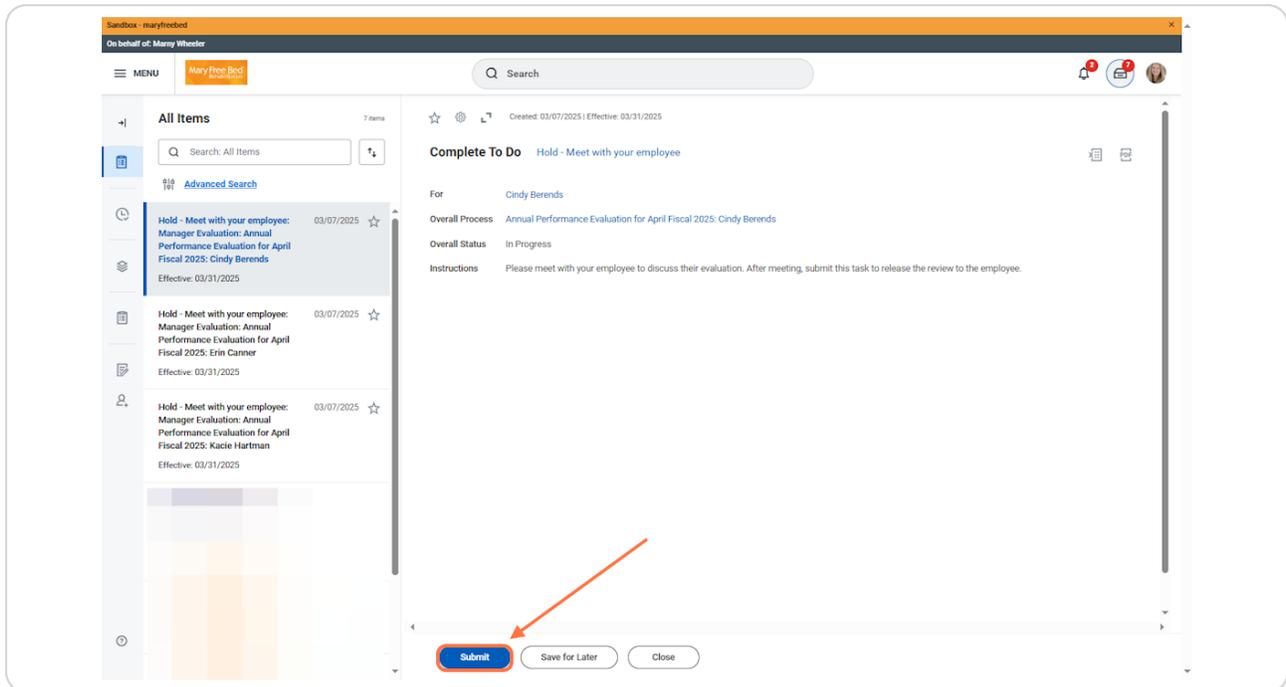
**DELIVER REVIEW TO EMPLOYEE: Select "Details" to open the full review of that employee.**

The screenshot shows a software interface with a sidebar on the left and a main content area on the right. The sidebar contains a search bar and a list of items under the heading "All Items". The main content area displays a "View Event" page for "Manager Evaluation: Annual Performance Evaluation for April Fiscal 2025: Cindy Berends". The page includes a "For" field with the name "Cindy Berends", an "Overall Process" field with the same text, and an "Overall Status" field with the value "In Progress". Below these fields are two tabs: "My Actions" and "Details". The "Details" tab is highlighted with a red box, and a red arrow points to it. Below the tabs is a table with the following structure:

Awaiting Me	Due Date	Business Process	Subject
To Do		Hold - Meet with your employee: Manager Evaluation: Annual Performance Evaluation for April Fiscal 2025: Cindy Berends	Hold - Meet with your employee

## STEP 41

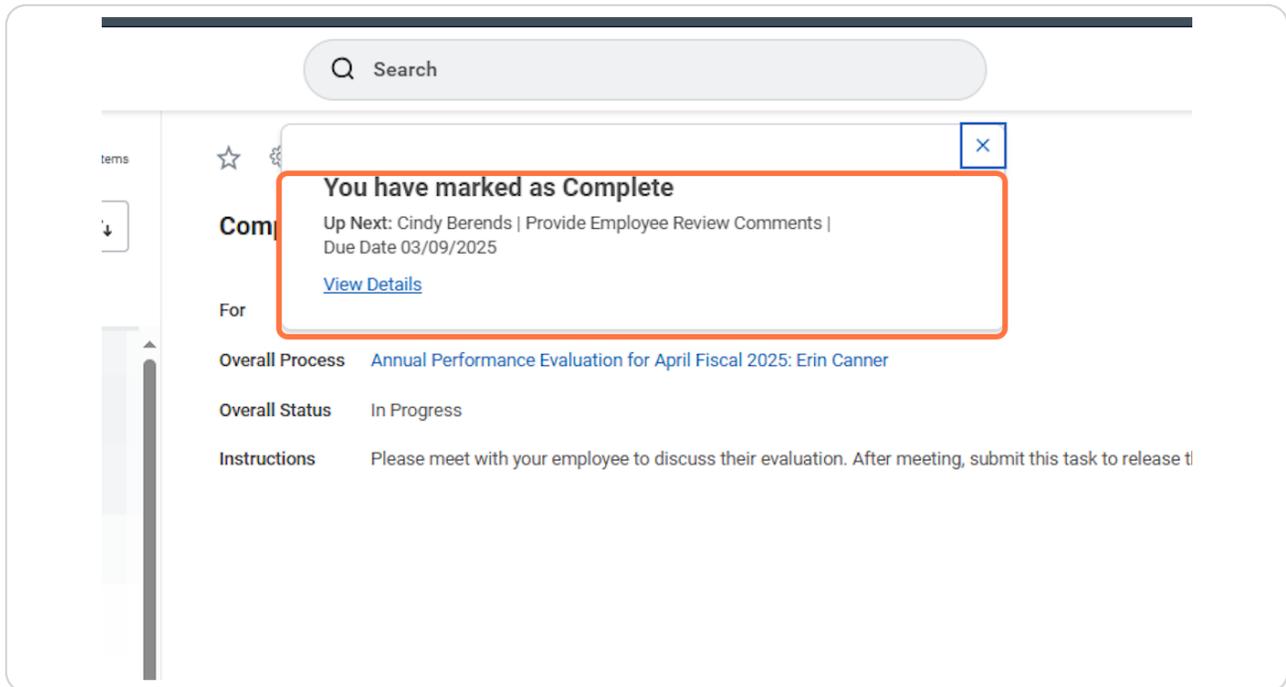
**SEND TO EMPLOYEE FOR SIGN OFF:** Once you're ready to release the review to the employee, you will find the task and click on the 'Submit' button to send to their tasks.



The screenshot displays a software interface for task management. On the left, a sidebar titled "All Items" lists three tasks, each with a date of 03/07/2025 and a star icon. The main area shows the details for a task titled "Hold - Meet with your employee". The task is for "Cindy Berends" and is part of the "Annual Performance Evaluation for April Fiscal 2025". The overall status is "In Progress". The instructions state: "Please meet with your employee to discuss their evaluation. After meeting, submit this task to release the review to the employee." At the bottom of the task detail view, there are three buttons: "Submit" (highlighted in blue), "Save for Later", and "Close". An orange arrow points to the "Submit" button.

## STEP 42

**SEND TO EMPLOYEE FOR SIGN OFF:** You will see an updated status of the review pop up that shows it's been sent to the employee, and it is in their queue to sign off on.



The screenshot displays a web application interface. At the top, there is a search bar with the text "Search". Below the search bar, a notification box is highlighted with a red border. The notification contains the following text:

- You have marked as Complete**
- Up Next: Cindy Berends | Provide Employee Review Comments |
- Due Date 03/09/2025
- [View Details](#)

Below the notification, the task details are visible:

- For**
- Overall Process** Annual Performance Evaluation for April Fiscal 2025: Erin Canner
- Overall Status** In Progress
- Instructions** Please meet with your employee to discuss their evaluation. After meeting, submit this task to release t