

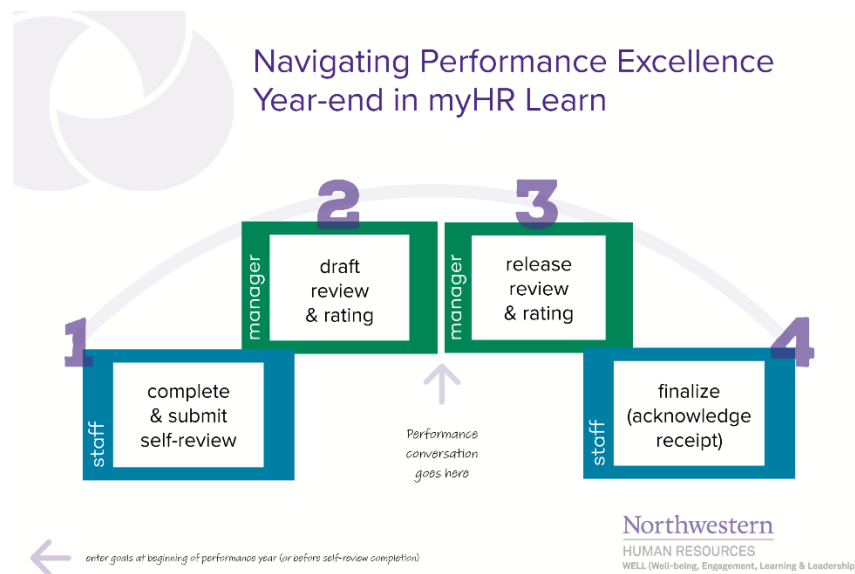
for supervisors

Enter and Release Year-end Review & Rating

Performance Excellence Job Aid

For supervisors, this job aid shows you how to:

- Read a staff member's submitted review and use the checklist provided to ensure that you have accessed all information shared and can take it into account as you write your performance review. For more information on how to write a supervisor review, please see resources on [this page](#).
- **Enter** review, ratings and **release** the review to your staff member. Please see this [infographic](#) for information on the myHR Learn workflow. This job aid focuses on phase 2 and 3, which are both manager actions.



Please note that supervisors will receive the following email notification from myHRLearn@northwestern.edu once your staff member has submitted their review

Saba Test1 has submitted a Performance Excellence form for your review and rating. Click [here](#) to access the review in myHR Learn. Helpful tools and guidance can be found at perform.northwestern.edu

Please do not reply to this email. If you have questions, please contact the IT Support Center at consultant@northwestern.edu or 847-491-4357 (1-HELP).

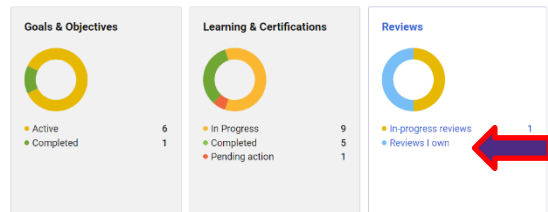
Northwestern | myHR Learn

Login to myHR Learn at learn.northwestern.edu

- From the navigation bar click **ME**.
And click **REVIEWS** → **REVIEWS I OWN**. *

A list of your staff member's names will appear. These staff report to you for performance (in myHR) and have Performance Excellence reviews assigned.

*Alternatively, on the Home Page you can also look under **CURRENT REVIEWS** → **REVIEWS I OWN**.



* **Reviews**

Current Reviews | Reviews I own

- 2021-2022 Performance Year
Saba Test | 17-AUG-2022 | 77 days remaining
- 2021-2022 Performance Year
Saba Test5 | 17-AUG-2022 | 77 days remaining

- Look for the review and click OPEN by clicking the blue OPEN button or the Blue hyperlinked text 20XX-20XX Performance Year . Once the form opens for the review hit the white Open button to access the review

If you see a name there in error or do not see a name you expect, [please contact the HR Administrator](#) in your area for assistance. If your list requires clean-up, please work with your HR Administrator to confirm that myHR data fields are correct.

Saba Test | 2021-2022 Performance Year | 17-AUG-2022 | 77 days remaining

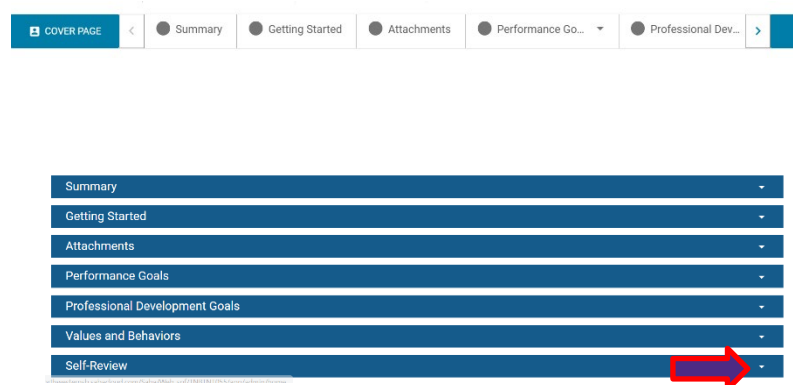
Open the form, complete it, and then submit it.

Review period 01-JUN-2021 to 31-MAY-2022

Reviewee Saba Test

OPEN | RELEASE

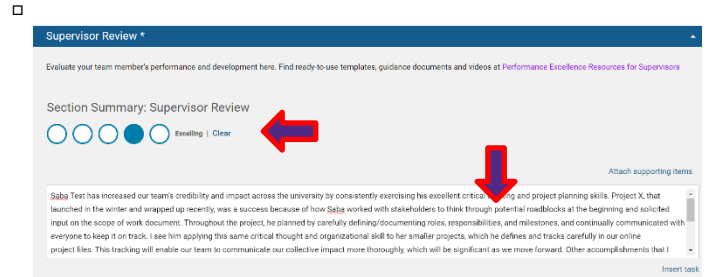
3. The review form is comprised of various sections: Summary, Getting Started, Attachments, Performance Goals, Professional Development Goals, Values and Behaviors, Self-Review, and Supervisor Review. Scroll down the page to access each section, or use the navigation bar located at the top of the page to jump directly to a section. Please note: To access your staff member's submitted self-review click on the drop-down arrow situated next to: **SELF-REVIEW**



4. Use the checklist below to navigate the various sections of your staff member's review:
- Attachments: documents which have been uploaded to a review will be visible in the right side ellipsis bar. Click on the ellipsis bar to drop down the menu, click Attachments to view documents.
 - Performance Goals: this section will display active goals and progress on the goals. *It is recommended that staff members enter 2-4 performance goals.*
 - Professional Development Goals: this section will display professional development goals. *Please note professional development goals are not rated.*
 - Values and Behaviors: this section will display your staff member's comments on how they have demonstrated Northwestern values and behaviors. It is recommended that all staff complete this section.
 - Self-Review: this section will display the staff member's summary or overview of their own performance.

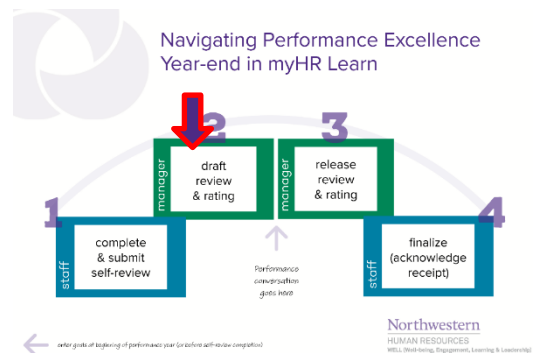
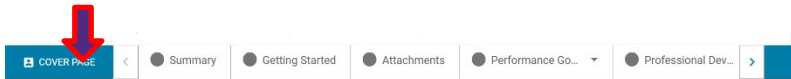
5. Navigate to the SUPERVISOR REVIEW section and click the down arrow

- Use the radio buttons to select your rating. Hover over any button to see the rating title.
- Enter your supervisor review in the text box. Click on “More” to reveal editing options for formatting



6. The review form will auto- save your rating and review. To save your comments and rating **without releasing** to Staff, you can hit the Cover Page for the review. **You have now completed Step 2 “Draft Review & Rating”**.*

*Please note there is **NO** submit button for this action

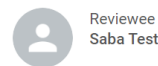


7. We **recommend that you have a performance conversation with your staff member before** completing Step 3 “Release review & Rating”.

8. Once you are ready to complete step 3 “Release review & Rating”, follow steps 1-2 above to get to the review. If you need to make edits, click the Open button and follow steps above. If you are ready to release click the blue Release button

Open the form, complete it, and then submit it.

Review period 01-JUN-2021 to 31-MAY-2022



9. Once you click the release button, it will take you to the next page, where you can review the rating you're giving your staff member. You can then click the Blue **RELEASE** button on the bottom right.

Submitting the form will release the form to the next participant (if any).

Reviewers	Rating
(Me, Review Owner)	● Excelling
Saba Test (Reviewee)	🔒 Not visible
Overall rating	● Excelling

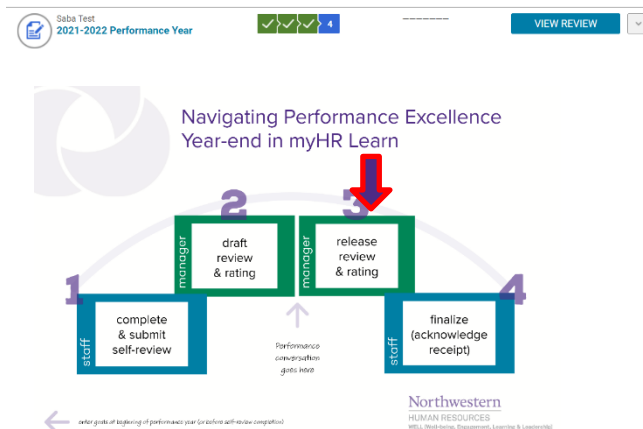
10. You will see a SUCCESS message appear to confirm that you have submitted and released the review. Click Close to get out of the review.

SUCCESS!

You have successfully submitted the form, and it has been sent to the next participant (if any). Select another person to access their form and act on it, or click Close.

Other reviewees to complete

11. From the navigation bar click **ME**. And click **REVIEWS** → **REVIEWS I OWN**. You will now see the review with 3 green checkmarks. **You have now completed Step 3 “Release Review & Rating”.***



12. Your staff member will receive an email alerting them that you have released their review and that they will need to Finalize the review by acknowledging receipt

Your supervisor has released your Performance Excellence review. Please note: your review will not be complete until you open and finalize it. Click [here](#) to access and finalize your review in myHR Learn. Helpful tools and guidance can be found at perform.northwestern.edu

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Ready to login? learn.northwestern.edu

Access additional tools and resources: perform.northwestern.edu

Help: For policy and process questions, [contact your unit's HR Administrator](#). For technical support: 847-491-4357 (1- HELP) or consultant@northwestern.edu