## Configuring Performance Management

The Performance Management utility in ExponentHR allows you to evaluate your employees' performance, maintain goal management, facilitate collaborative performance planning, and two-way communication throughout the year.

Performance Administrators have complete visibility to the Performance Management setup to determine which group of employees are eligible for performance reviews, how frequently they are evaluated, and on what criteria. Additionally, these groups can be scored based on a global rating scale or have varying rating methodologies that best match each group's specific needs. These and similar setup features are administered through the performance configuration settings found in the *Options* drop-down menu.
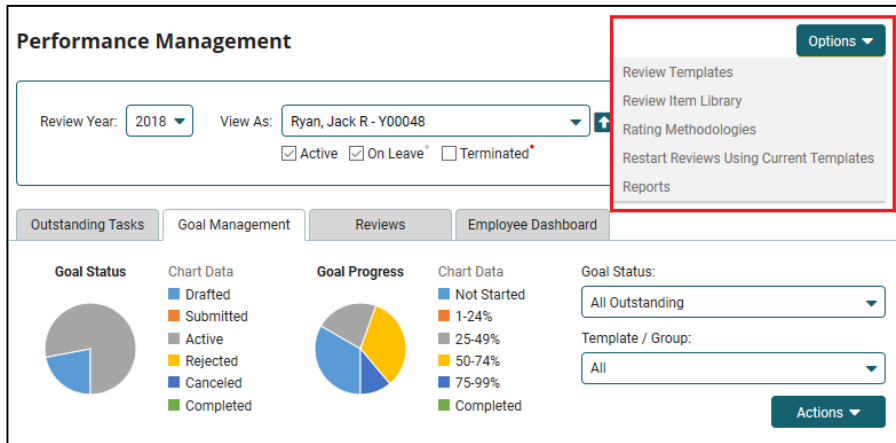
Note: The configuration settings are available only to users given Performance Administrator Limited or Unlimited Grant Access rights.

When setting up the performance configuration for your organization, to the right is a generic workflow of steps to initiate and maintain the performance review cycle.

If you need further assistance with any part of ExponentHR, contact the ExponentHR Service Team at: (866) 612-3200 or support@exponenthr.com.

Step	Action	Comments/Features
1	Define the Rating Methodology	If your performance review template includes scoring an employee's performance, the first step is defining the numeric or text rating scales. (If you have a 1-5 rating scale, you can edit the labels and descriptions of the ExponentHR default methodology)
2	Create Performance Template	Create the default template that applies to the majority employee base. Create additional template(s) for each applicable review group (i.e. managers).
	General Setup	*Includes:* Template type, annual review period, periodic schedule frequency (if applicable), eligibility waiting period, employee goal requirements, and more.
	Apply To	Define which employees are applicable for the respective review template based on a variety of available employee classification filters.
	Schedule	Set the timeline for each activity of the performance review cycle to drive notifications and when tasks appear on the outstanding task dashboard.
	Annual/Periodic Review	Create the sections and review criteria that are to be used when evaluating an employee's performance. This includes: Selecting the Rating Methodology to be used for each section and overall review, controlling comment requirements, and optional/mandatory inclusion on the final review.

See reverse side for sample images

Template Settings
Visual Concepts_Default Template (DEFAULT)

Edit ▼ | Copy | Exit

| General Setup | Apply To | Schedule | Annual Review | Periodic Review |

Template Information

Description: Visual Concepts_Default Template   Template Status: Active
Type: Focal-Point Review (common schedule)   Effective Review Years: 2016 -
History: 📄 View   (based on the last day of the review period.) ☑ No End Date

Annual Review Period

	Start Date	End Date
Annual Review Period	Jan 1	Dec ▾ 31 ▾
First Year (if different) ❓	Jan ▾ 1 ▾ 2011 ▾	Dec 31, 2016

Performance Settings

Applicable Review Frequencies:
☑ Annual
☑ Periodic ❓   Semi-Annual ▾   First Half Only ▾
☐ Probationary Period   0   calendar days after hire date.
☑ Off-Cycle

Employee Goals Allowed Per Year ❓: 1 ▾ - 10 ▾
Tenure Required for Review: 0 ▾ Months
Signature Lines on Printed Review: 3 ▾
Print Rating Definitions on Review: No ▾
Show Classifications on Review: ☑ Locations ☑ Department ☑ Divisions ☐ Project ☐ Region
Require Employee Acknowledgement: Yes ▾

Approval

Managers in the top: All ▾   OSM levels may self-approve what they author.

Template Settings
Visual Concepts_Default Template (DEFAULT)

Edit ▼ | Copy | Exit

| General Setup | Apply To | Schedule | Annual Review | Periodic Review |

Specify the timelines for performance reviews.   Print Schedule ▾ | Copy Existing Schedule

The system calculates the review schedule dates dynamically based on the Task Start and Duration settings. You can click the calculated start or end date in the "Show Schedule For" column and select a different date. This will adjust the Task Start or Duration for that task and will impact all years for which the template is active.

Annual Review Timeline

Activity	Task Start (Calendar Days)	Duration (Weekdays)	Show Schedule For 2019 ▾
Review Period			1/1/2019 - 12/31/2019
☑ Establish Goals	0 days before review period start	13	1/1/2019 - 1/18/2019
Draft & Submit Reviews	0 days before review period end	13	12/31/2019 - 1/17/2020
Self Reviews	☐ Auto-Send Invitations ☐ Include Goals ❓	10	12/31/2019 - 1/14/2020
Contributor Reviews	Reviewers send contributor invitations	10	12/31/2019 - 1/14/2020
Review and Approve Reviews	Same as Draft & Submit Reviews Start Date	30	12/31/2019 - 2/11/2020
Deliver Reviews to Employees	0 days before Review & Approve end ▾	12	2/11/2020 - 2/27/2020

Template Settings
Sales_Unrated Goals Only

Edit ▼ | Copy | Exit

| General Setup | Apply To | Schedule | Annual Review | Periodic Review |

This template will be applied to employees who meet the following criteria: List Employees

Filter Types Available:

◯ Company	Not in use
◯ Locations	Not in use
⦿ Department	1 of 13
◯ Divisions	Not in use
◯ Region	Not in use
◯ Project	Not in use
◯ Job Codes	Not in use
◯ EEO Codes	Not in use
◯ Union Codes	Not in use
◯ Executive Levels	Not in use
◯ Bonus Plans	Not in use
◯ Pay Groups	Not in use
◯ Pay Methods	Not in use
◯ Employment Types	Not in use
◯ Include Specific Employees	Not in use
◯ Exclude Specific Employees	Not in use

Available
00-CORP - 00-Corporate
01-FIELDTECH - 01-Field Techs
02-ITHELP - 02-IT Helpdesk
03-BAKING - 03-Baking Facility
04-DISTRO - 04-Distribution
10 - Executive
20 - Marketing
40 - Production
50 - Information Technology
60 - Service Team
70 - Operations

Selected
30 - Sales

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Template Settings
HPTC

Edit ▼ | Copy | Exit

| General Setup | Apply To | Schedule | Annual Review |

Specify the sections and evaluation criteria for the annual review.   Copy from Another Template

Overall Score

Rating: Derived from Sections (Variable Weighting) ▾   Methodology: 5-Point Scale (Outstanding - Unsatisfactory) ▾   View

General Employee Competencies
Rating: 5-Point Scale (Outstanding - Unsatisfactory)   Weight: 20.00% ✏

Team Player

Description
Develops positive working relationships with the other team members. Collaborates with the team to achieve greater results. Fully participates in department and company meetings and activities.

Properties
Include in these reviews: ☑ Primary ☑ Contributor ☑ Self   Visibility Required: Yes ▾
Weight: 50.00 %